CAPT

Centers for the Application of Prevention Technology

USER MANUAL

VERSION 1.1

November 2012

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TABLE OF CONTENTS

Introduction....4
Tips For Using the Application Effectively....5
- Recommended Computer Settings....5
- Application Navigating....6
  - Menu Information....7
  - Landing Pages....9
  - Listing Pages....10
- Data Fields & Buttons....12

Login Procedure....13
- Change Your Password....15
- Forgot Your Password?....17
- Account Locked....19

Home....20
TA Service....21
- Add TA Service....23

Events....24
- Add an Event....26

Clients....28
- Clients....29
  - Request to Add an Organization....30
- Contacts....31
  - Enter Contact....32

Data Analysis....33
- Reports....34

User Support....35
Administration....36
- Form Item Manager....36
  - Manage TA Service/Event Form Questions....37
  - Adding TA Service/Event Form Question....38
  - Manage TA/Event Question Answer Options....39
- RET Information Manager....40

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Staff Manager 41
Manage TA Provider Assignment 42
Manage CAPT Staff 44
Client Manager 46
Adding Organization Information 47
User Roles and Permissions Manager 48
Manage Application Role Settings 49
Manage User Permissions 50
CAPT Message Manager 51
Manage CAPT Alerts 52
User Support Upload Page 53

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INTRODUCTION

The CAPT application is a web-based system designed to help the Core and RETs track all CAPT training and technical assistance (T/TA) services. The processes are part of an overall evaluation effort designed to help CSAP, the CAPT, and individual Regional Expert Teams (RETs) better understand the specific types of work carried out by the CAPT system, the extent and scope of that work, and, where possible, the impact of that work on prevention policy and implementation both regionally and throughout the United States. The two main components of the current system are the Technical Assistance Database and the Event Database. Administrative functions are available under the Admin module.

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TIPS FOR USING THE APPLICATION EFFECTIVELY

Recommended Computer Settings

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 x 768 pixels or larger. If your screen resolution is smaller (ex. 800 X 600 pixels), everything on the screen will appear larger. But, if you use 800 X 600 pixels, then you will have to scroll more both up & down and left & right to access all the data fields.

To change your PC Monitor settings, right click on the Desktop Background and select Properties. Next, click on the Settings tab and move the Screen Resolution scroll bar to the right (towards "more") to select 1024 x 768 resolution. Click the OK icon at the bottom of the window to make the change effective.

Web Browser

The web browser supported by CAPT is Microsoft Internet Explorer (IE). Currently Mozilla Firefox, Netscape, AOL, MSN and other browsers may not be supported by CAPT. They may function, but not to design specifications. We recommend users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).

Pop-Up Blockers

Modern computer security technology and usability features development have lead to pop-up blocking. Although this new feature of internet browsers, toolbars and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like CAPT require pop-ups to be able to function. If your pop-up blocker is enabled, then there is a possibility that by CAPT may not function or appear properly. You should either disable the pop-up blocker while using by the CAPT (while remembering to enable it, if desired, when not in CAPT) or create exceptions for the pop-up blocker. This is cumbersome, but may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your Internet Explorer browser window. Once the browser is open, click the top toolbar option "Tools" and then go to "Internet Options". After the Internet Options window is available, you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab, at the bottom will be a section on Pop-Up Blockers. If you're "Block Pop-Ups" checkbox is checked, then click on the "Settings" button. You can now add the CAPT link to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from CAPT.

*Note: These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

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Application Navigating

CAPT is set up in such a fashion that moving from top to bottom of each page and section to section on the menu is the only approach to using the application. You must start at Home and complete the Coalition Classification Tool, then move to Assessment, filling in all the information for that area (all pages and sub-menus), before moving on to Capacity. Continuing in this manner will ensure that all of the sections of the system have enough information to function correctly. If certain sections have not been completed, you will have difficulty completing other sections. You also must save each screen before moving onto the next section by clicking on the SAVE button located at the bottom of the page.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	The Cursor	Points to desired location
	The TAB key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	The Control (Ctrl) key	Enables blocked material to open (due to pop-up blocker)
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

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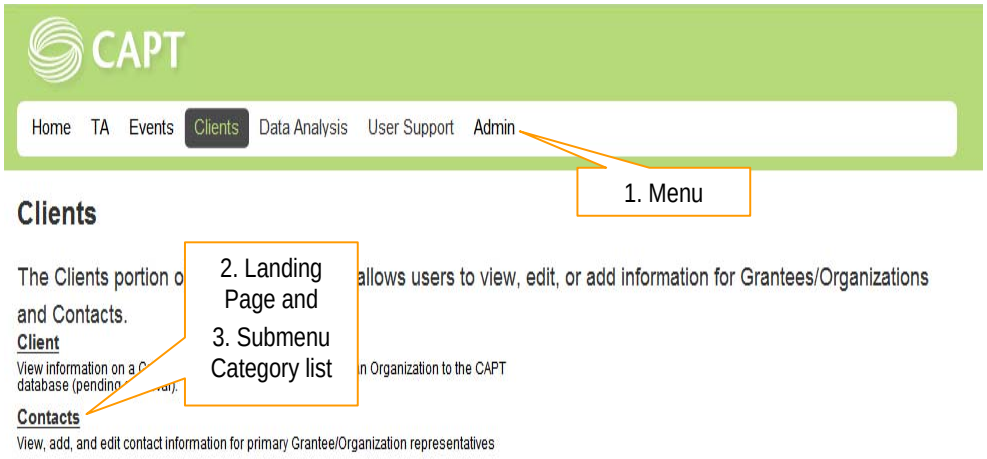
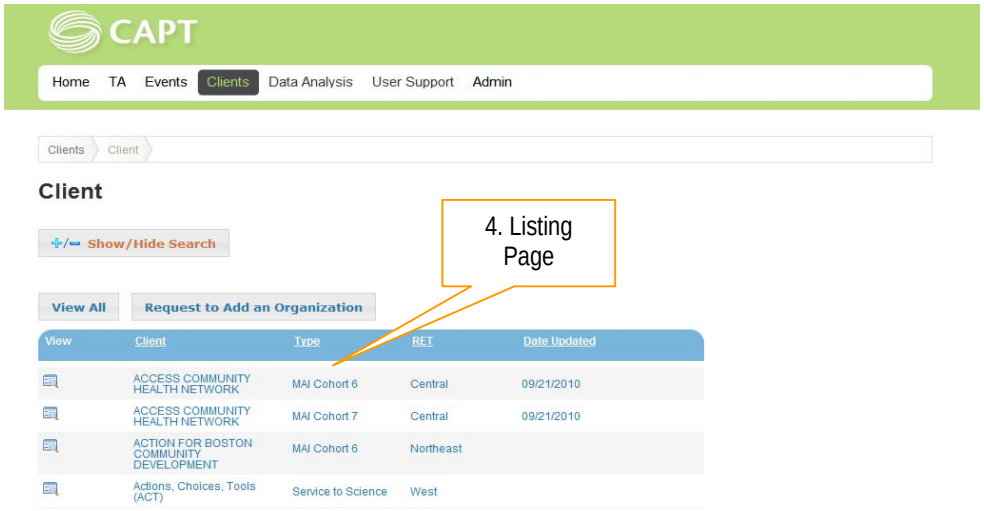
Menu Information

The Menu for the service is located across the top of the screen. Some Menu categories may be broken down into submenu categories to choose from. The Menu categories list the main modules that are within the application. When a Menu category is selected a list of submenu categories will be displayed on the Landing Page as links to access the modules. (For more information on Landing Pages, see the Understanding the Landing Page section.)

1. Menu	Constant (unchanging). Available at all times.
2. Landing Page	Varies depending on which Menu category is selected. Displays the Submenu Categories.
3. Submenu Category	Varies depending on which Menu category is selected.
4. Listing Page	Varies depending on which Submenu Category is selected.



(This is a screenshot displaying the Menu (1), a Landing Page (2) and a Submenu Category list (3))


CAPT
Home TA Events Clients Data Analysis User Support Admin
Clients Client
Client
Show/Hide Search
4. Listing Page
View All
Request to Add an Organization
View Client Type RET Date Updated
ACCESS COMMUNITY HEALTH NETWORK MAI Cohort 6 Central 09/21/2010
ACCESS COMMUNITY HEALTH NETWORK MAI Cohort 7 Central 09/21/2010
ACTION FOR BOSTON COMMUNITY DEVELOPMENT MAI Cohort 6 Northeast
Actions, Choices, Tools (ACT) Service to Science West

(This is a sample screenshot displaying a Listing Page (4))

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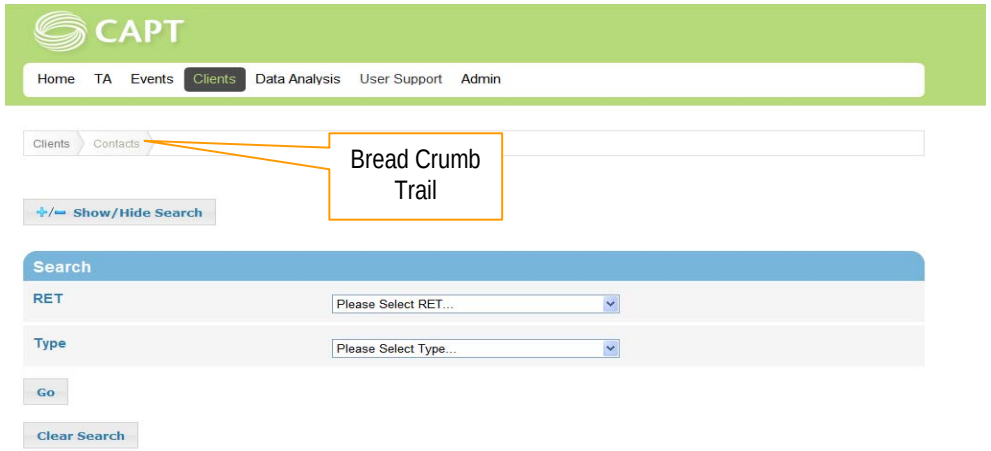
Bread Crumb Trail

A “Bread Crumb Trail” is provided to indicate where you currently are in the system. The links provided in the Bread Crumb Trail also allows you to move **backwards** in the application.



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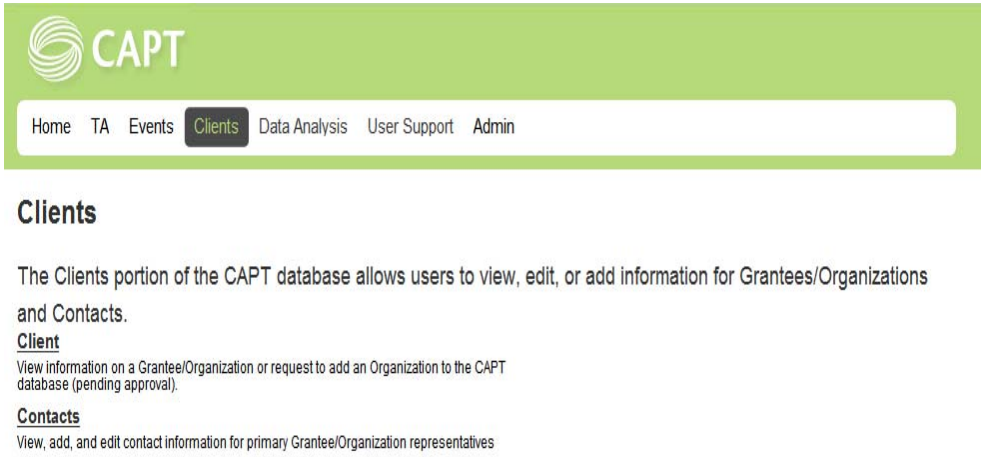
Landing Pages

When first entering a module you may see a list of the entire categories associated with that module. This is called a "Landing Page". The Landing Page of a module provides a description of what can be done in that module as well as listing each category as a link to the Listing Page and entry forms. (For more information on the Listing Pages, see the Listing Page section.) No data is entered on the Landing Page.

To open a category:

- Click on the Landing Page Submenu Category link.


CAPT
Home
TA
Events
Clients
Data Analysis
User Support
Admin
Clients
The Clients portion of the CAPT database allows users to view, edit, or add information for Grantees/Organizations and Contacts.
Client
View information on a Grantee/Organization or request to add an Organization to the CAPT database (pending approval).
Contacts
View, add, and edit contact information for primary Grantee/Organization representatives

(This is a screenshot displaying a Landing Page.)

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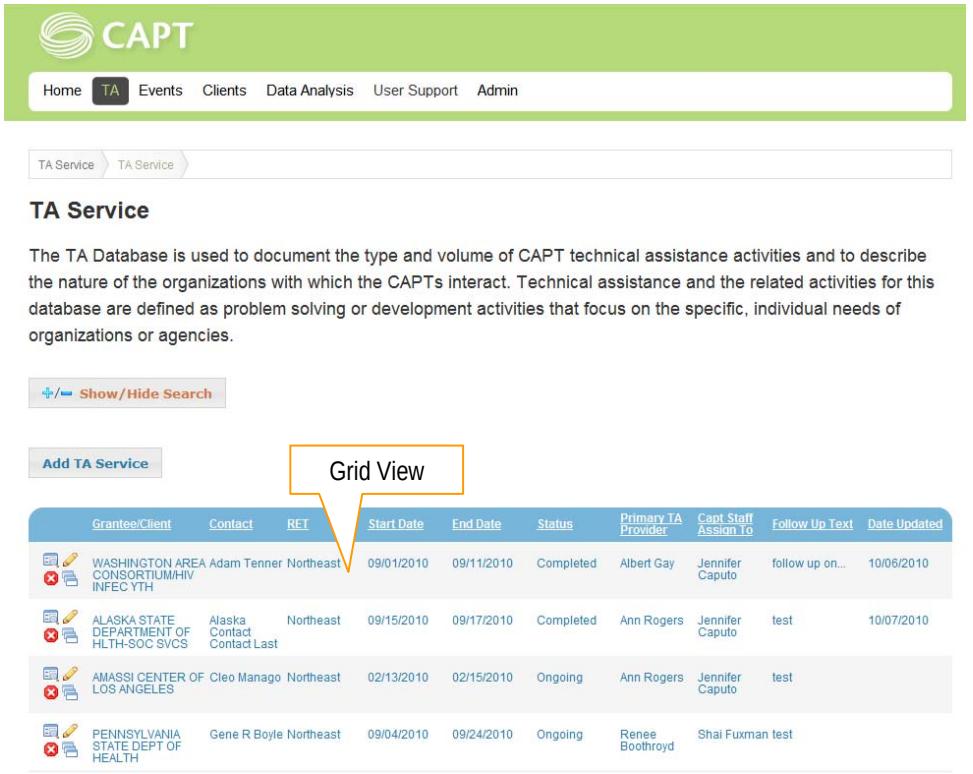
Listing Pages

After selecting a category from the Landing Page you will see the “Listing Page”. When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

Grid View

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

- When first viewing a Listing Page, all of the data is available for Searching. Click the links to the left of the data you would like to edit/view/copy/delete.



(This is a sample screenshot displaying a “Grid View” Listing Page.)

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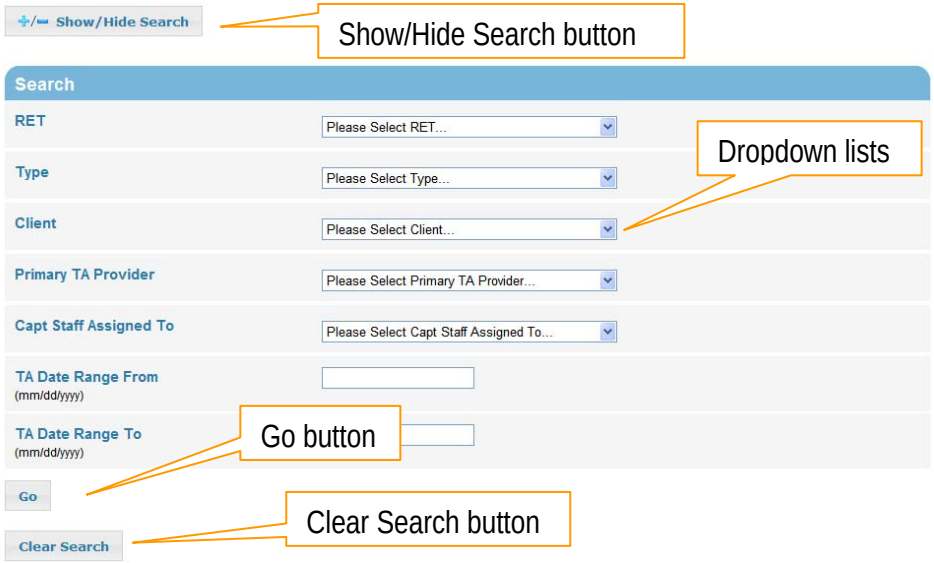
Search Features

There are several pages in which users can search data in the grid.

1. Select the desired data from the dropdown lists or insert data in the text boxes.
2. Click the Go (Go) button to search for data based on the fields selected from the drop down lists.
3. Click the Clear Search (Clear Search) button to clear the fields you selected for searching.

*Note: Click Show/Hide Search (Show/Hide Search) button at any time to Show or Hide the search feature when needed.



(This is a sample screenshot displaying a blank Edit Form.)

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Data Fields & Buttons

In CAPT there are several fields, boxes, and buttons that are used to collect, store, print, organize and delete data. Here are some examples:

Type	Preview/Description
Text Field (aka 'Text Box')	
Dropdown List (aka 'Pull Down Menu')	
Radio Buttons	Selected Not Selected
Check Boxes	Selected Not Selected
Required Field	**CAPT Trainers/Facilitators:***

Enter data into CAPT can be made easier by using the "Tab" key on the keyboard. The "Tab" key advances the cursor to the next data field. You can go from the current field to the previous field by holding the "Shift" key and pressing "Tab" (Shift + Tab). You can also navigate through the fields by using the mouse.

If a required field does not have data entered into it and you try to save the form, you will receive a message that informs you of the field vacant of data and you will not be able to save that form until that field has data. Some or all of the fields may be required in order to save the form. Those fields that are required are bold and with an asterisk next to the field name.

Tips

- Type an identifying letter of an item in a dropdown list to appear in the box.

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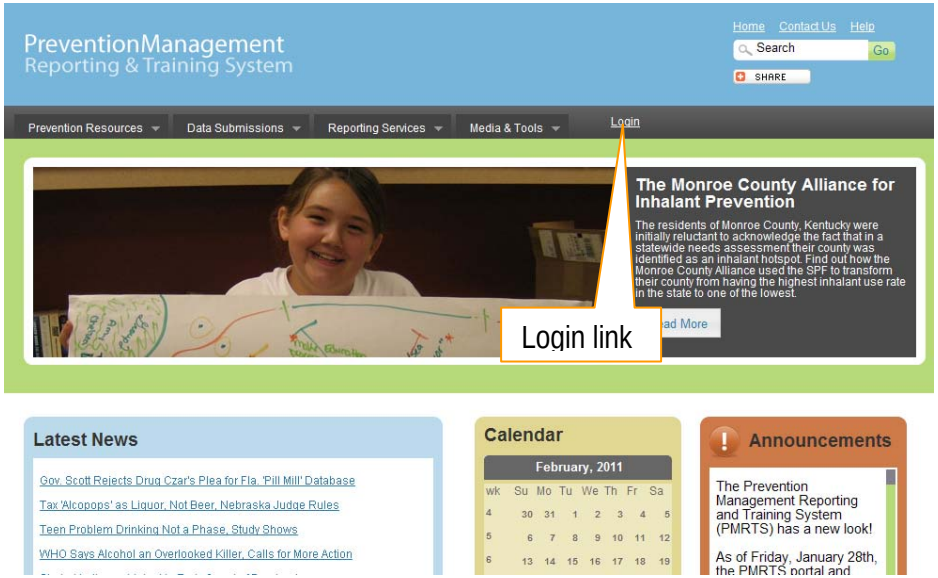
LOGIN PROCEDURE

Connect to the Internet using your Internet browser (Internet Explorer or Netscape Navigator). In the Address (Location) box, type in the following address and press enter: https://www.csams.samhsa.gov/csamsportal/

To access CAPT, you will login through SAMHSA/CSAP's DCCC-CSAMS website.

1. Click the Login (**Login**) link located on the top right hand corner of the screen.


PreventionManagement
Reporting & Training System
Home
Contact Us
Help
Search
Go
SHARE
Prevention Resources
Data Submissions
Reporting Services
Media & Tools
Login
The Monroe County Alliance for Inhalant Prevention
The residents of Monroe County, Kentucky were initially reluctant to acknowledge the fact that in a statewide needs assessment their county was identified as an inhalant hotspot. Find out how the Monroe County Alliance used the SPF to transform their county from having the highest inhalant use rate in the state to one of the lowest.
Login link
Latest News
Gov. Scott Rejects Drug Czar's Plea for Fla. 'Pill Mill' Database
Tax 'Alcopops' as Liquor, Not Beer, Nebraska Judge Rules
Teen Problem Drinking Not a Phase, Study Shows
WHO Says Alcohol an Overlooked Killer, Calls for More Action
Calendar
February, 2011
Announcements
The Prevention Management Reporting and Training System (PMRTS) has a new look!
As of Friday, January 28th, the PMRTS portal and

(This is a partial screenshot displaying the Login Page.)

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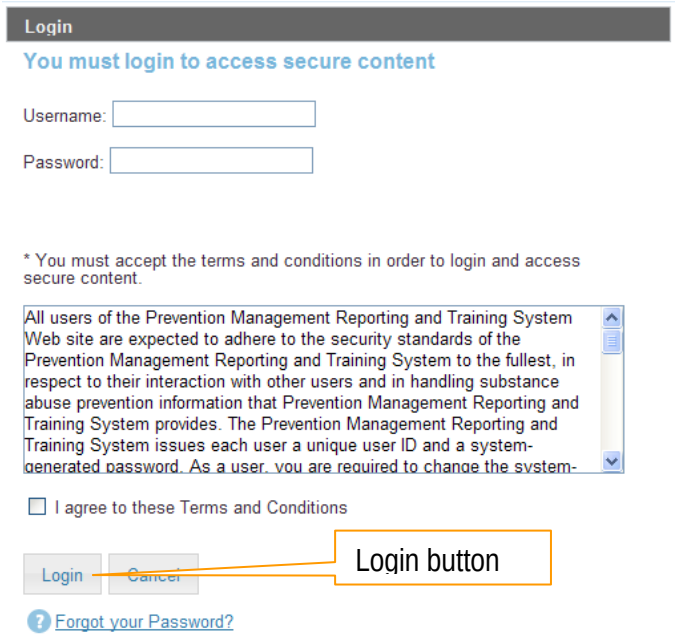
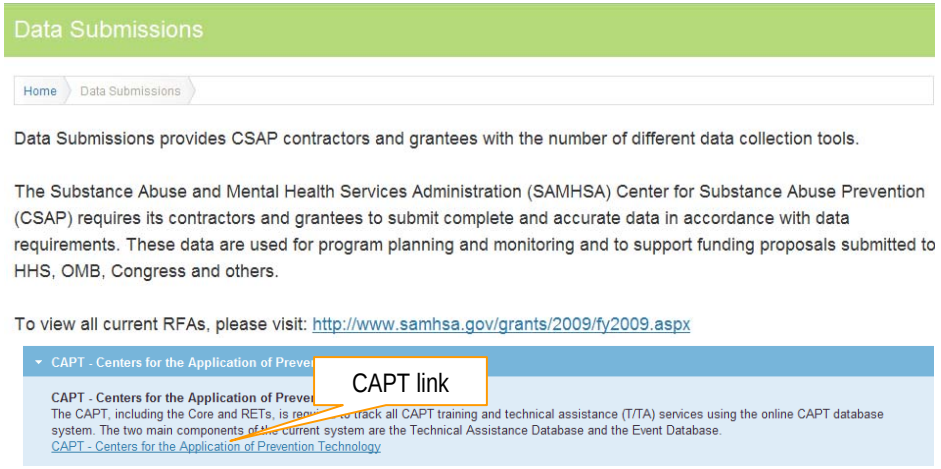
2. Type the login name provided by the acting administrator in the **Username*** field.
3. Type the password in the **Password*** field.
4. Click the box that states: '**I agree to these Terms and Condition**'.
5. Click the Login (**Login**) button.

*Note: To cancel the login process, click the Cancel (Cancel) button.


Login
You must login to access secure content
Username:
Password:
* You must accept the terms and conditions in order to login and access secure content.
All users of the Prevention Management Reporting and Training System Web site are expected to adhere to the security standards of the Prevention Management Reporting and Training System to the fullest, in respect to their interaction with other users and in handling substance abuse prevention information that Prevention Management Reporting and Training System provides. The Prevention Management Reporting and Training System issues each user a unique user ID and a system-generated password. As a user, you are required to change the system-
I agree to these Terms and Conditions
Login
Cancel
Login button
Forgot your Password?

(This is a partial screenshot of the Login Page.)

6. Click **Data Submissions** from the Prevention Management Reporting and Training System main menu.
7. Click the **CAPT** link.


Data Submissions
Home
Data Submissions
Data Submissions provides CSAP contractors and grantees with the number of different data collection tools.
The Substance Abuse and Mental Health Services Administration (SAMHSA) Center for Substance Abuse Prevention (CSAP) requires its contractors and grantees to submit complete and accurate data in accordance with data requirements. These data are used for program planning and monitoring and to support funding proposals submitted to HHS, OMB, Congress and others.
To view all current RFAs, please visit: http://www.samhsa.gov/grants/2009/fy2009.aspx
CAPT - Centers for the Application of Preve
CAPT link
CAPT - Centers for the Application of Preve
The CAPT, including the Core and RETs, is req
system. The two main components of the current system are the Technical Assistance Database and the Event Database.
CAPT - Centers for the Application of Prevention Technology

(This is a partial screenshot of the Prevention Resources Landing Page.)

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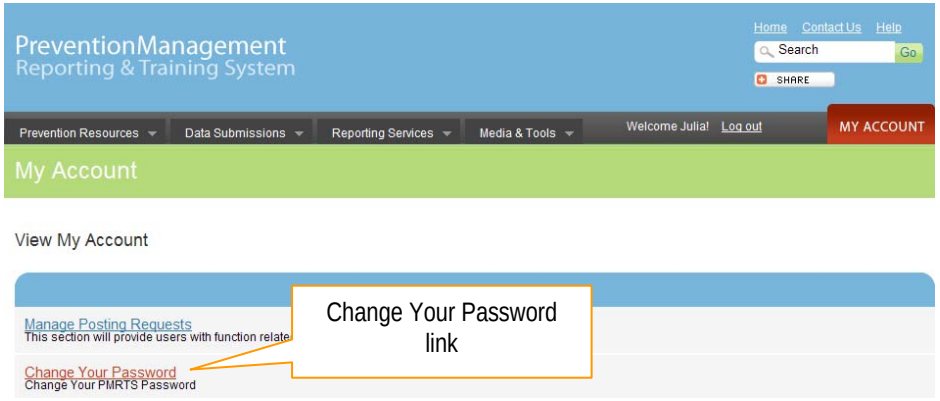
Change Your Password

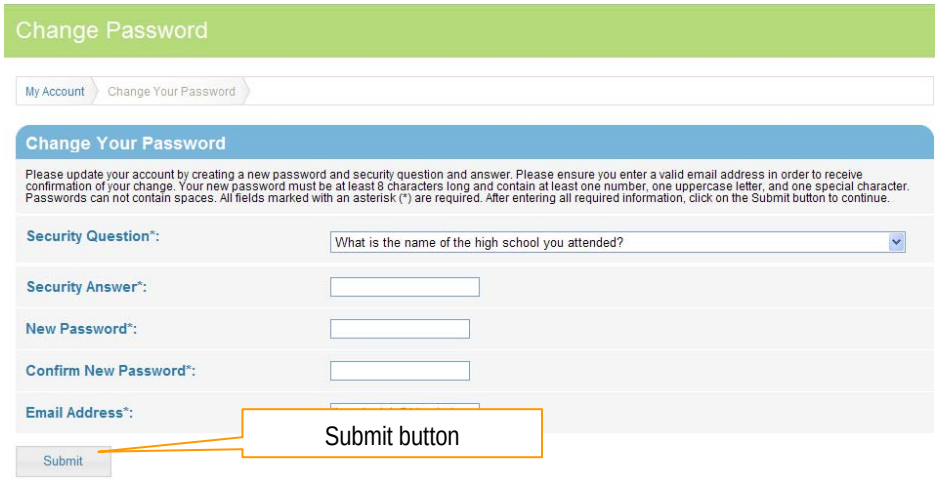
The Change Your Password feature allows a user to change the password for the account he or she is currently logging into the system with.

1. To change your password, begin by clicking the **My Account** from the Prevention Management Reporting and Training System main menu.
2. Click the **Change Your Password** link.



(This is a screenshot displaying the My Account Landing Page.)

3. Select a **Security Question*** from the dropdown list.
   *Note: The Security Question will be used when using the Forgot Password feature to ensure the user requesting a password is legitimate.
4. Enter your answer to the selected security question in the **Security Answer*** field.
5. Type the password you would like to use in the **New Password*** field.
6. Retype the password in the **Confirm New Password*** field.
7. Verify or update the email address in the **Email Address*** field.
8. Click the Submit (**Submit**) button.


Change Password
My Account
Change Your Password
Change Your Password
Please update your account by creating a new password and security question and answer. Please ensure you enter a valid email address in order to receive confirmation of your change. Your new password must be at least 8 characters long and contain at least one number, one uppercase letter, and one special character. Passwords can not contain spaces. All fields marked with an asterisk (*) are required. After entering all required information, click on the Submit button to continue.
Security Question*:
What is the name of the high school you attended?
Security Answer*:
New Password*:
Confirm New Password*:
Email Address*:
Submit
Submit button

(This is a screenshot displaying the Change Your Password Page.)

Tips

- The User Name IS NOT case sensitive.
- The Password IS case sensitive. The Password must also fill the following requirements:
  - Minimum length: 8 characters
  - At least one upper case

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At least one number

At least one of the special characters: !@#$%^&

- You will be required to change your password every 90 days.

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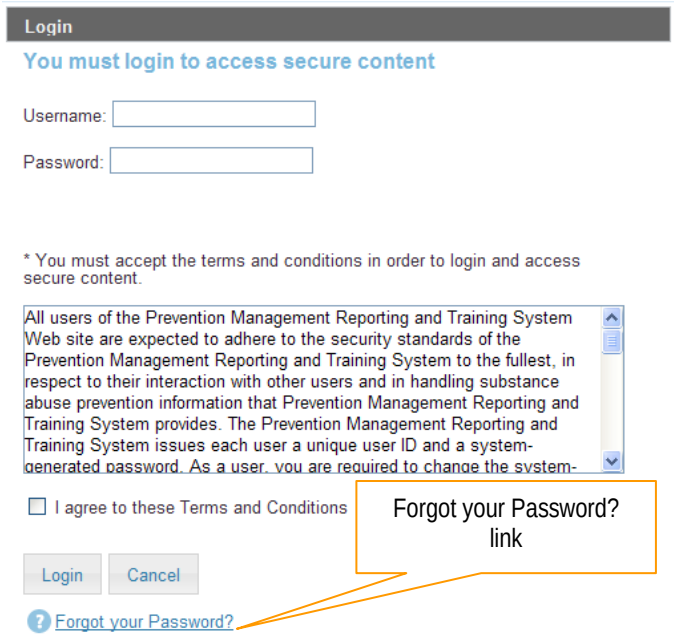
Forgot Your Password?

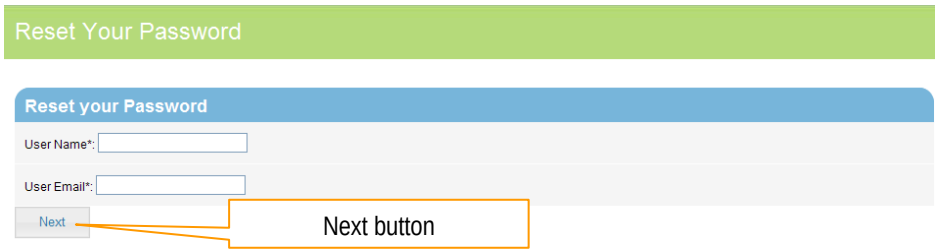
If you are unable to log into the CAPT application due to forgetting your password, you can retrieve this information by clicking the link entitled "Forgot your Password?"

1. On the Login page, click the Forgot your Password? link.


Login
You must login to access secure content
Username:
Password:
* You must accept the terms and conditions in order to login and access secure content.
All users of the Prevention Management Reporting and Training System Web site are expected to adhere to the security standards of the Prevention Management Reporting and Training System to the fullest, in respect to their interaction with other users and in handling substance abuse prevention information that Prevention Management Reporting and Training System provides. The Prevention Management Reporting and Training System issues each user a unique user ID and a system-
I agree to these Terms and Conditions
Login
Cancel
Forgot your Password?
Forgot your Password? link

(This is a screenshot displaying the Login Page.)

2. Type the login name in the User Name field.
3. Type the email address of the user who is associated with the User Name in the User Email field.
   *Note: This must be a valid email address.
4. Click the Next (Next) button.
5. On the next screen answer the Security Question.
6. Click the Next (Next) button.



(This is a screenshot displaying the Reset Your Password Page.)

Tips

- If you currently do not have an account you will not be able to use the Forgot Password feature.

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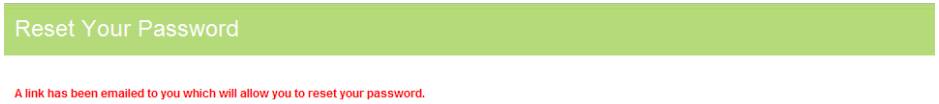
7. A new temporary password will be sent to the email address that is associated with the User Name.



(This is a screenshot displaying the Reset Your Password Page.)

Tips

- If you do not receive a new temporary password first check your junk mail and spam folders. If you still did not receive a temporary password, contact Support at 1-888-348-4248. The following reasons may be the cause: your email address has changed since the account was created, you mistyped the email address, or you are unable to receive emails from Support.
- Please add the following domain to your safe list: @kitsolutions.net to ensure you receive emails from Support.

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Account Locked

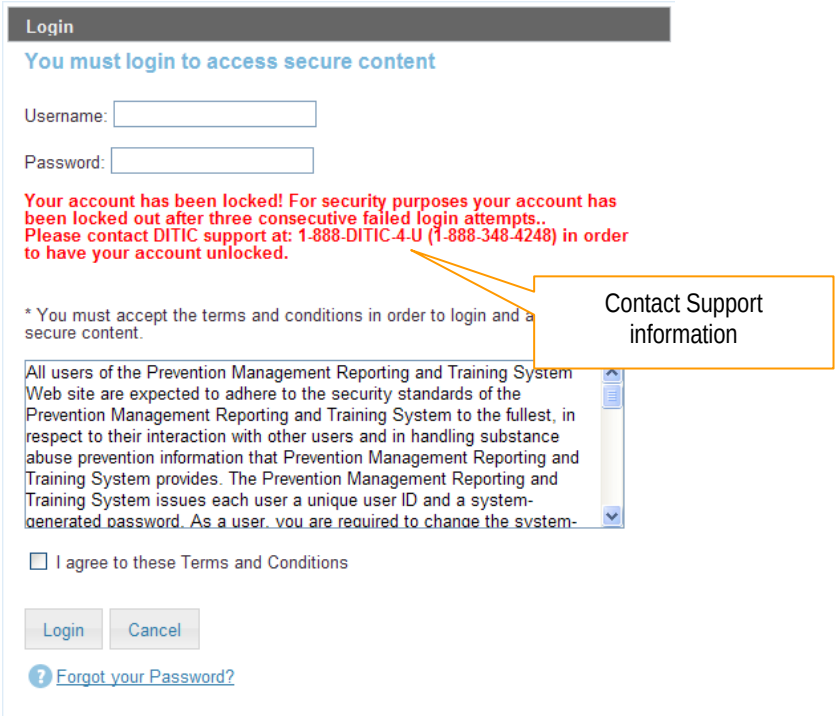
If you attempt to log into the system unsuccessfully three (3) times, you will be locked out of your account. Please contact Support to have your account unlocked.

SUPPORT CONTACT INFORMATION:

- 1-888- 348-4248
- DCARSupport@kitsolutions.net
- Use the Contact Form on the Support Site: http://kitusers.kithost.net/support/dcarsupport

Once your account is unlocked you will receive an email:

1) The email informs you that your account has been unlocked. Subject line will read: **User Account has Been Unlocked**

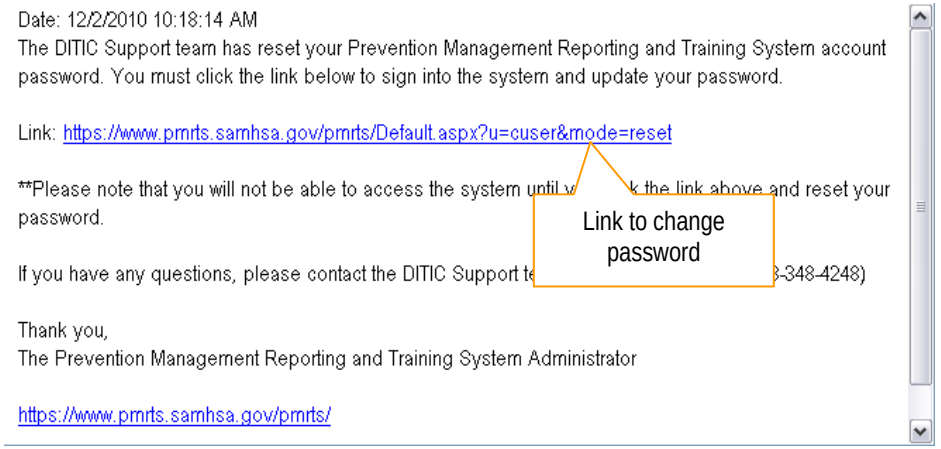

Login
You must login to access secure content
Username:
Password:
Your account has been locked! For security purposes your account has been locked out after three consecutive failed login attempts.. Please contact DITIC support at: 1-888-DITIC-4-U (1-888-348-4248) in order to have your account unlocked.
Contact Support information
* You must accept the terms and conditions in order to login and a secure content.
All users of the Prevention Management Reporting and Training System Web site are expected to adhere to the security standards of the Prevention Management Reporting and Training System to the fullest, in respect to their interaction with other users and in handling substance abuse prevention information that Prevention Management Reporting and Training System provides. The Prevention Management Reporting and Training System issues each user a unique user ID and a system-generated password. As a user, you are required to change the system-
I agree to these Terms and Conditions
Login
Cancel
Forgot your Password?

(This is a screenshot displaying the Login Page when the account has been locked.)

When your account is unlocked you can request Support to reset your password if you do not remember your current password.

Once your password has been reset you will receive an email:

The email provides you a link to reset your password.
Subject line will read: **Password Has Been Reset**


Date: 12/2/2010 10:18:14 AM
The DITIC Support team has reset your Prevention Management Reporting and Training System account password. You must click the link below to sign into the system and update your password.
Link: https://www.pmrts.samhsa.gov/pmrts/Default.aspx?u=cuser&mode=reset
**Please note that you will not be able to access the system until y k the link above and reset your password.
Link to change password
If you have any questions, please contact the DITIC Support te -348-4248)
Thank you,
The Prevention Management Reporting and Training System Administrator
https://www.pmrts.samhsa.gov/pmrts/

(This is a sample screenshot of a Password Reset email.)

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HOME

The Home Page provides the CAPT staff with a greeting and also provides important messages, due dates and basic information about the CAPT application.

1. CAPT Home page
2. If provided, the CAPT Home page will list any CAPT Messages or CAPT Alerts.

(This is a sample screenshot displaying the CAPT home page.)

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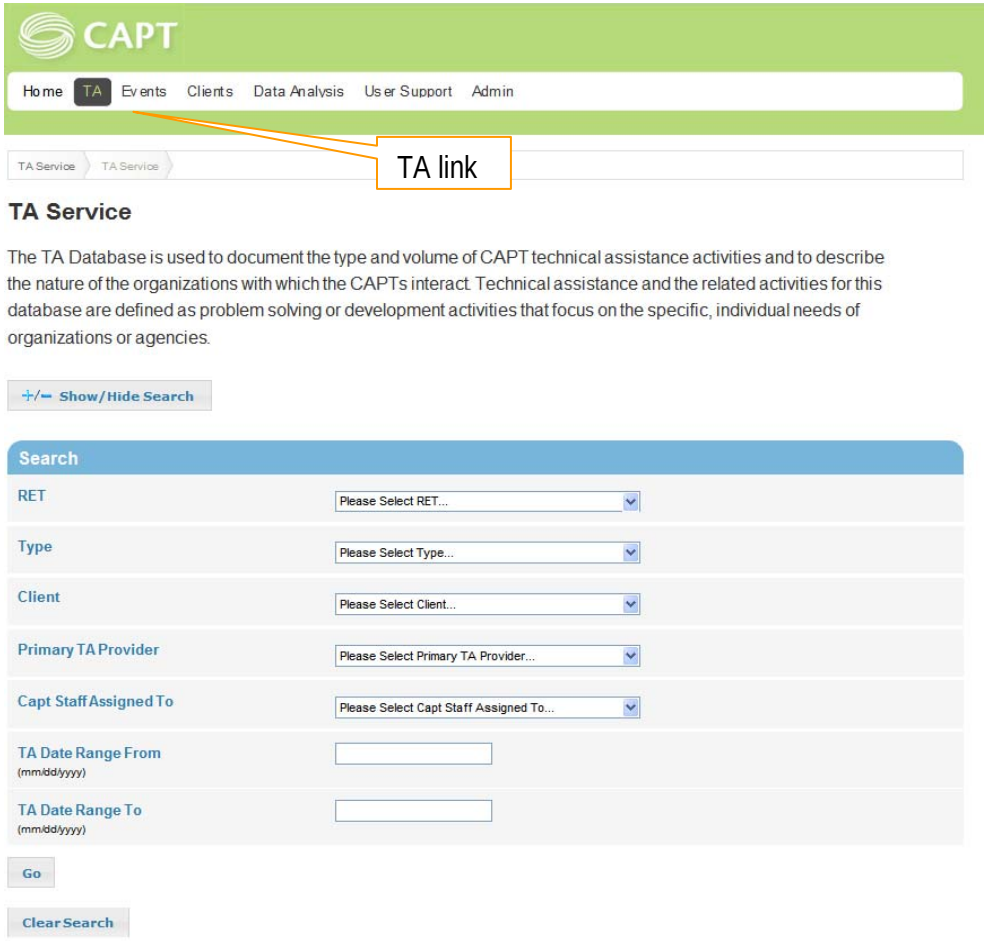
TA SERVICE

The TA Service module is used to document the type and volume of CAPT technical assistance activities and to describe the nature of the organizations with which the CAPTs interact. Technical assistance and the related activities for this database are defined as problem solving or development activities that focus on the specific, individual needs of organizations or agencies.

1. Click TA from the Menu.
2. From the TA Service Listing page you can filter TA Services using the drop down boxes in the Search menu.



(This is a sample screenshot displaying the TA Listing page.)

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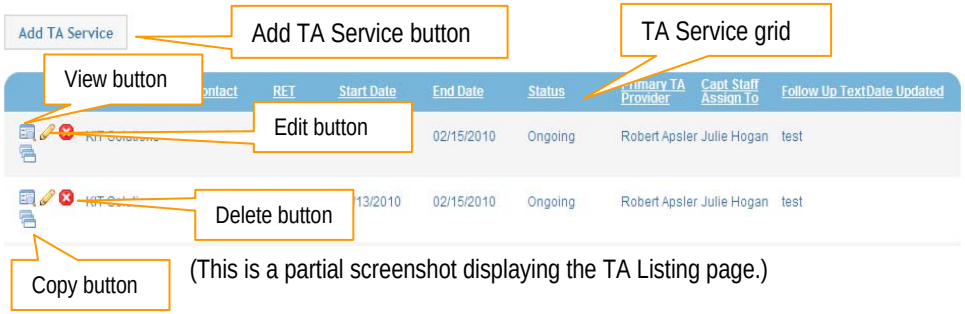
3. Click the Add TA Service (**Add TA Service**) button to enter TA Service data.
4. Click the (**Edit**) button to view or edit the TA Service data entered for that record. Click the (**Delete**) button to delete the TA Service data entered for that record.

   Click the (**Copy**) button to copy the record of the TA Service data entered for that record.



(This is a partial screenshot displaying the TA Listing page.)

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Add TA Service

1. From the TA Service Listing page, click the Add TA Service (**Add TA Service**) button.
2. Enter all required fields, denoted by an asterisk (*).
3. Click the Save (**Save**) button to save the TA Service.

   *Note: If you don't desire to continue to add TA Service information, click the Cancel (**Cancel**) button to return to the TA Service Listing page.

Enter Service
* Indicates a Required Field
Type:
Please Select Type...
Client:*
If you are unable to locate your Client, please go to the Clients module and click Client to Request to Add an Organization.
Client Contact Name:
If you are unable to locate your Client Contact Name, please go to the Clients module and Click Contacts to Add A Contact.
Email:*
StartDate:*
(mm/dd/yyyy)
Status:
Ongoing
EndDate:
(mm/dd/yyyy)
Capt Staff TA is Assigned to *:
Please Select...
Text for Potential Follow-up:*
We would like your feedback on a recent TA that you received from the CAPT concerning
Primary TA Provider *
Person client will recognize as primary service provider -- may include consultants
Please Select...
Other TA Provider(s)
(Other providers that took part in the service)
Description of Service Provided:*
(update as service progresses)
Training/Technical Assistance Tracker Number:
(if available)
Hours spent on *
Service Delivery
Time spent working directly with client delivering customized service; generally on-site or via electronic communication.
Service Preparation
Time spent assessing need, responding to, and planning for client's TA/event request; does not include time spent on logistics
Logistical Support
Time spent arranging logistics in support of client service; examples include registration and technical details for an online events, arranging space and speakers for a conference.
Travel
Time spent travelling in support of service delivery; for example, if travel to and from a TA service event was a round-trip 3-hour flight plus 1-hour car ride to a conference which lasted 3 days, you would record 6 total hours of travel
Total Hours:*
Number of people from this organization receiving this TA:*
Is this TA related to*
SPF-SIG: Yes No
State Epidemiological Outcomes Workgroups (SEOW): Yes No
Partnerships for Success: Yes No
USE(D Underage Drinking (SRAA): Yes No
Service to Science: Yes No
Minority HIV/AIDS Initiative (MAI): Yes No
Air Force Reserve Command (AFRC): Yes No
Health Reform: Yes No
Tribal/Indian Nations: Yes No
US/Mexico Border Initiative: Yes No
18-25 Year Olds : Yes No
Elderly/Older Americans : Yes No
Military Personnel & Families: Yes No
Alaskan Natives: Yes No
Pacific Jurisdictions: Yes No
Services provided over the course of this TA*
Targeted assessment to customize TA delivery (needs/resources/readiness)
Resource identification (e.g., identifying relevant existing data sources)
Resource/materials dissemination (existing)
Resource/materials development or customization (new/modified)
Literature review/synthesis
Expert/consultant referral
Review of reports/plans/tools (e.g., logic models, service delivery plans)
Facilitated planning (e.g., logic model development, review State prevention plan, develop data analysis plan)
Operations support (e.g. workforce development)
Partnership development (e.g., facilitate SEOW meeting)
Cross-site/agency networking (planning/mentoring/sharing lessons)
Training/TOT development
Training/TOT planning (for implementation)
Training/TOT delivery
Other (specify)
How does this TA relate to SAMHSA's Strategic Prevention Framework*
Not Applicable
Assessment
Capacity
Planning
Implementation
Evaluation
Cultural Competence
Sustainability
Content/Topic Area(s) addressed during the Course of this TA:
CAPT Information
Collaboration
Community Development
Cultural Competence/Diversity
Developing Prevention Systems
Environmental Strategies
Evaluation
Grant Writing/Funding/Resource Development
Health Reform
Identifying/Selecting/Implementing Evidence-Based Programs
Information Technology (e.g., web page development, compressed video)
Marketing/Communications
National Outcome Measures (NOMs)
Needs Assessment
Organizational Development
Prevention Fundamentals (e.g., SAPST)
Prevention in Specific Settings (e.g., workplace, correctional facilities)
Readiness Assessment
Risk and Protective Factors
SAMHSA's Strategic Prevention Framework (SPF)
Strategic Planning
Sustainability
Substance Use/Abuse
Utilizing Epidemiological Data
Violence Prevention
Youth Involvement
Other (specify)
Save
Cancel

(This is a screenshot displaying the Add a TA Service Page.)

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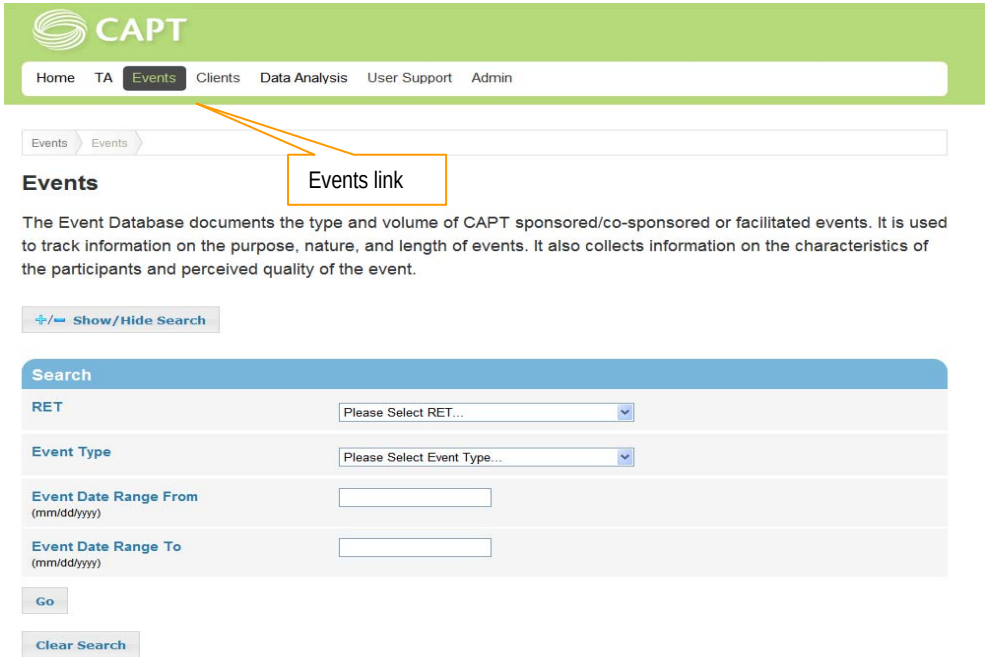
EVENTS

The Event Database documents the type and volume of CAPT sponsored/co-sponsored or facilitated events. It is used to track information on the purpose, nature, and length of events. It also collects information on the characteristics of the participants and perceived quality of the event. Training activities that present information or help participants acquire a specific set of skills are the most frequent form of events.

1. Click **Events** from the Menu.
2. From the **Events** Listing page you can filter Events using the drop down boxes in the Search menu.



(This is a sample screenshot displaying the Events Listing page.)

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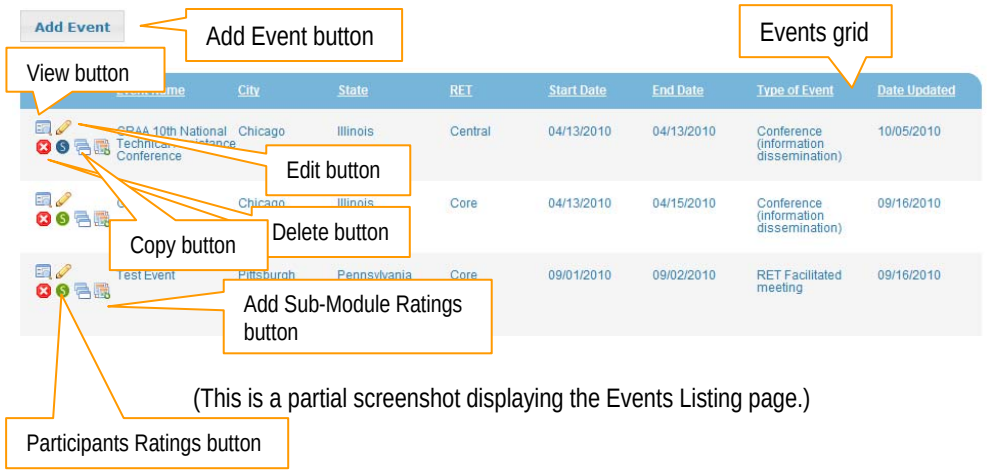
3. Click the Add Event (Add Event) button to enter Event data.
4. Click the (View) button to view the Event data entered for that record.
   Click the (Edit) button to edit the Event data entered for that record.
   Click the (Delete) button to delete the Event data entered for that record.
   Click the (Copy) button to copy the record of the Event data entered for that record.
   Click the (Participants Ratings) to enter or view Participant Ratings data.
   Click the (Add Sub-Module) button to add a sub-module for a particular event.



(This is a partial screenshot displaying the Events Listing page.)

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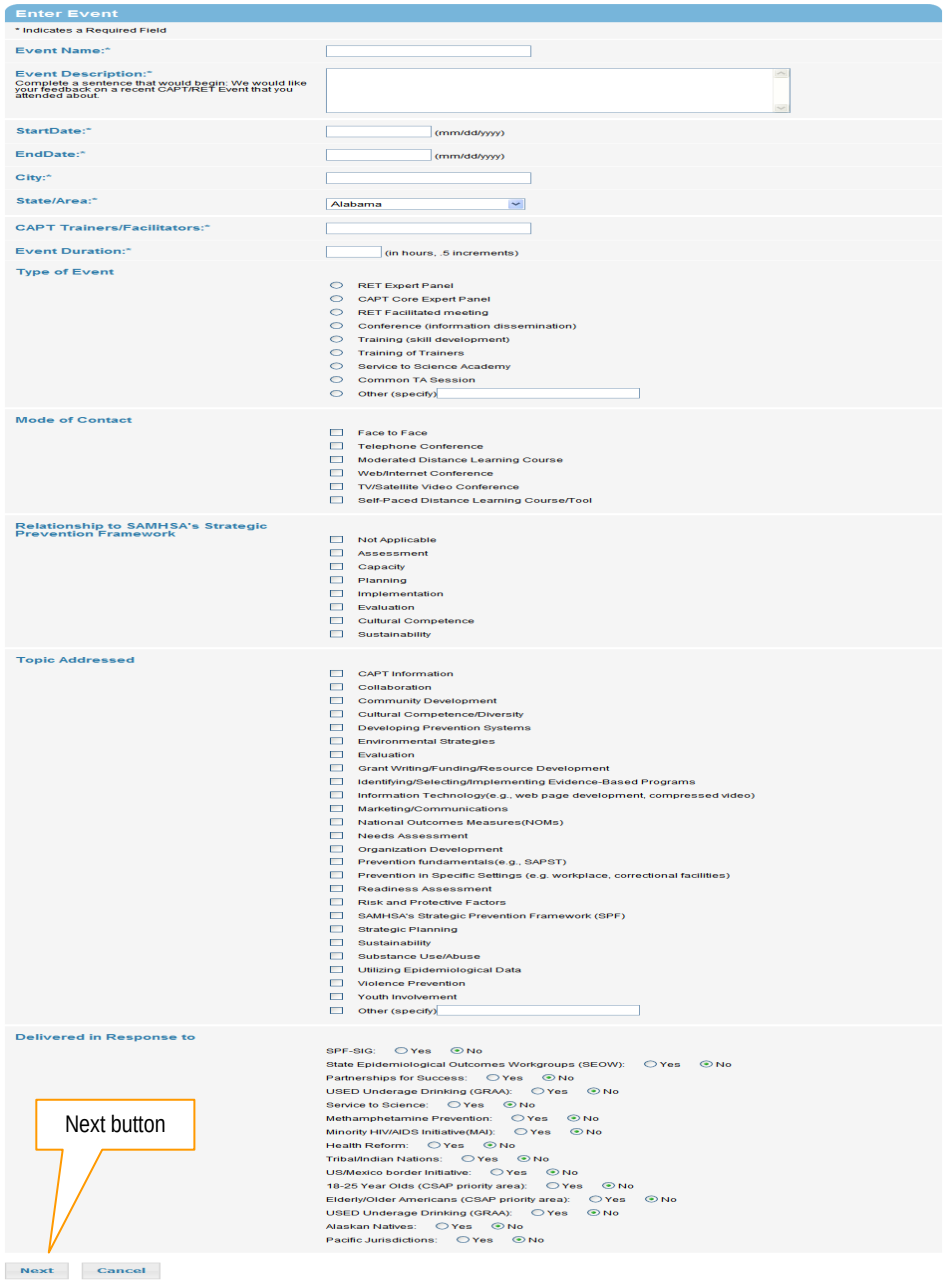
Add an Event

1. From the Event Listing Page, click the Add Event (**Add Event**) button.
2. Enter Event data for all required fields, denoted by an asterisk (*).
3. Click the Next (**Next**) button to continue to enter Event data.

*Note: If don't desire to continue to add Event information, click the Cancel (**Cancel**) button to return to the Event Listing page.



(This is a sample screenshot of the Add Event page.)

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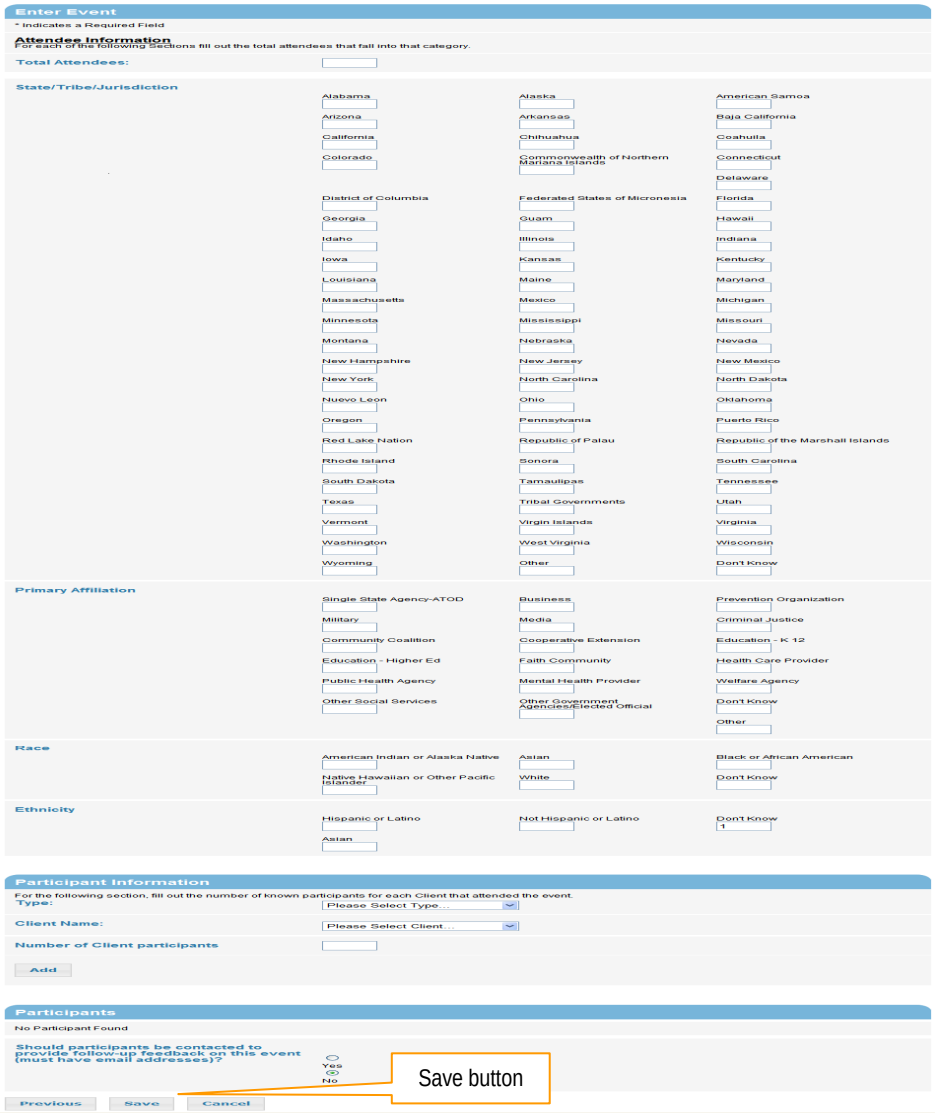
4. Enter all required fields for Event Attendee and Participation Information sections, denoted by an asterisk (*).
    a. The total number of Attendees, Primary Affiliation, Race and Ethnicity should be equal.
5. Click the Save (Save) button to save the Event record.

*Note: If you do not desire to add the Event, click the Cancel (Cancel) button.

*Note: If you need to make any changes to the previous Add Event page, click the Previous (Previous) button go back to the previous screen.



(This is a sample screenshot of the Add Event page.)

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CLIENTS

The Clients portion of the CAPT database allows users to view, edit, or add information for Grantees/Organizations and Contacts.

1. Click **Clients** from the Menu.
2. From the **Clients** landing page you can navigate to one of the following sections:
    a. Clients
    b. Contacts

CAPT
Home
TA
Events
Clients
Data Analysis
User Support
Clients link
Clients
The Clients portion of the CAPT database allows users to view, edit, or add information for Grantees/Organizations and Contacts.
Client
View information on a Grantee/Organization or request to add an Organization to the CAPT database (pending approval).
Contacts
View, add, and edit contact information for primary Grantee/Organization representatives

(This is a sample screenshot of the Clients Landing page.)

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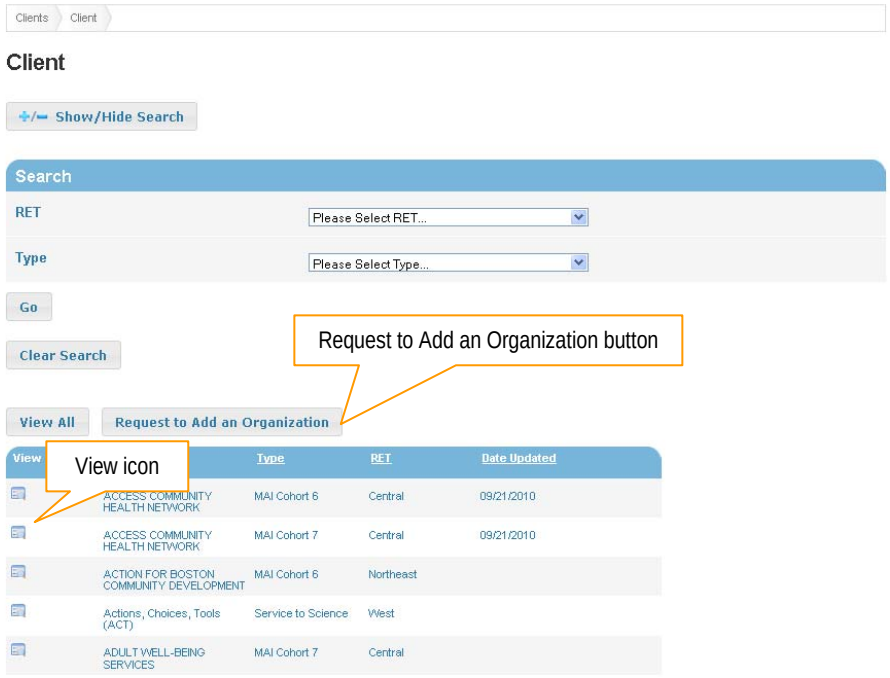
Clients

1. Click **Clients** from the Client Landing page.
2. From the **Clients** Listing page you can filter Client information using the drop down boxes in the Search menu.
3. Click the (**View**) icon in the grid to view Client information as needed.
4. Click the Request to Add an Organization (**Request to Add an Organization**) button to enter Organization information.



(This is a partial screenshot displaying Clients Listing page.)

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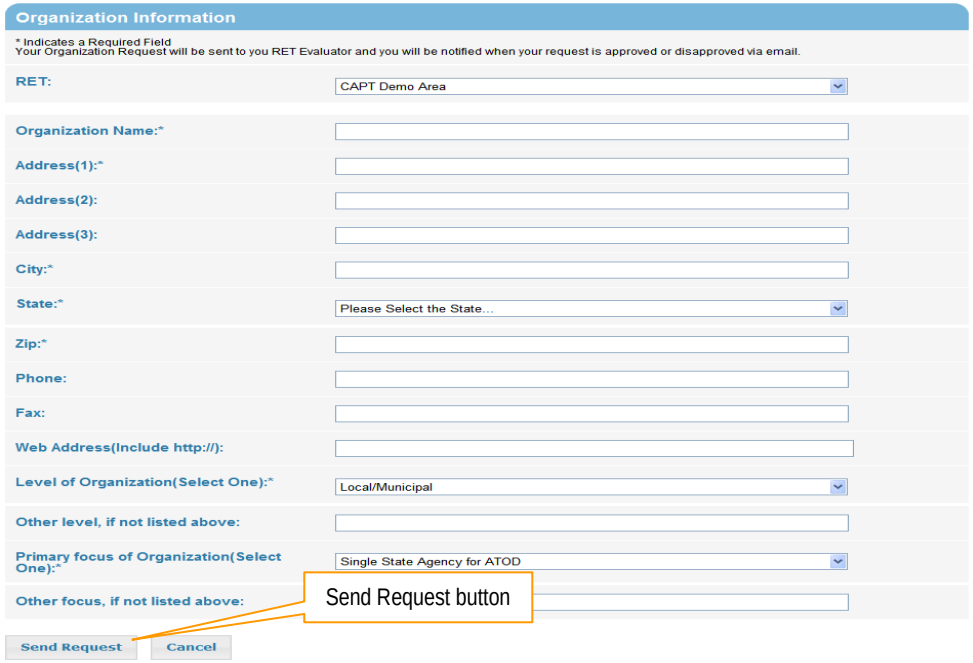
Request to Add an Organization

1. From the Clients Listing Page, click the Request to Add an Organization (**Request to Add an Organization**) button.
2. Select RET for which you would like to Request an Organization
3. Enter all required fields, denoted by an asterisk (*).
4. Click the Send Request (**Send Request**) button to send the Organization request to the RET Evaluator for approval.

   *Note: If you do not desire to send the request, click the Cancel (**Cancel**) button to return to the Clients listing page.

   a. An email will be sent to the Organization requester letting them know that the request was sent. The RET Evaluator will then approve or disapprove of the request and the requester will be notified of the result.



(This is a sample screenshot of the Request to Add an Organization page.)

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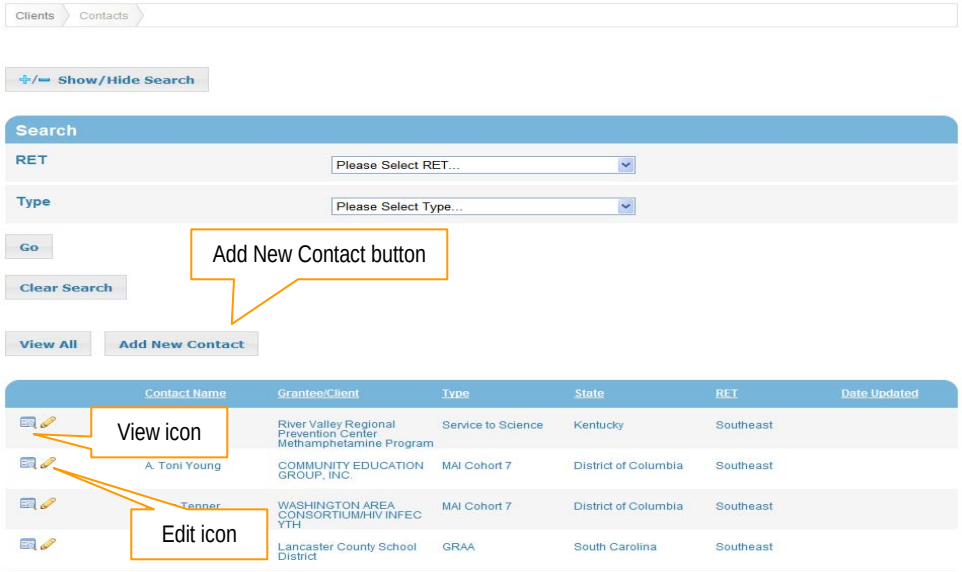
Contacts

1. Click **Contacts** from the Client Landing page.
2. From the **Contacts** Listing page you can filter Contact information using the drop down boxes in the Search menu.
3. Click the Add New Contact (**Add New Contact**) button to enter Contact information.
4. Click the (**View**) button to view the Contact information as needed.
   Click the (**Edit**) button to edit the Contact information entered for that record.



(This is a sample screenshot of the Contacts Listing page.)

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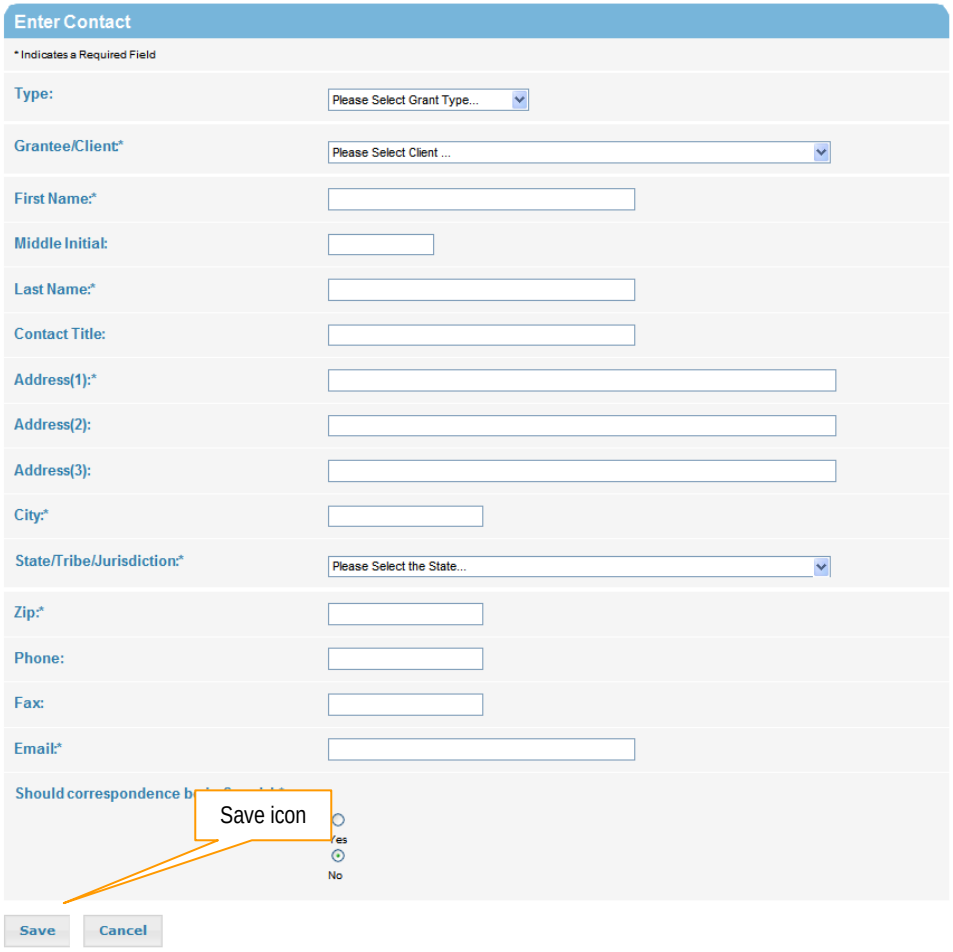
Enter Contact

1. From the **Contacts** Listing page, click the Add New Contact (**Add New Contact**) button.
2. Enter all required fields, denoted by an asterisk (*).
3. Click the Save (**Save**) button to add a new Contact to a Client.

*Note: If you do not desire to add a new contact, click the Cancel (**Cancel**) button to return to the Contacts listing page.



(This is a screenshot of the Add New Contact page.)

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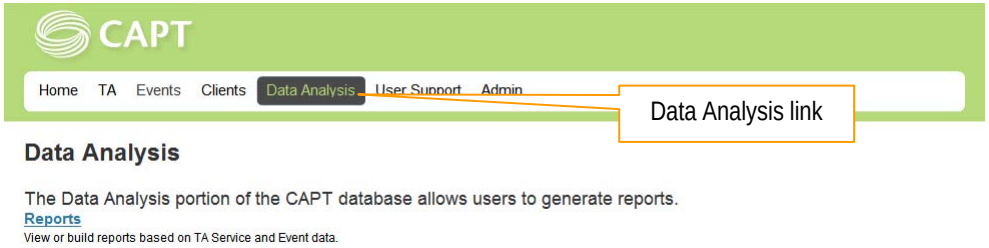
DATA ANALYSIS

The Data Analysis portion of the CAPT database allows users to generate reports.

1. Click **Data Analysis** from the Menu.
2. From the **Data Analysis** landing page you can navigate to one of the following sections:
    a. Reports



(This is screenshot of the Data Analysis Landing page.)

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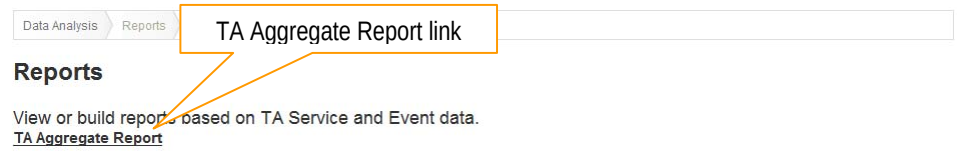
Reports

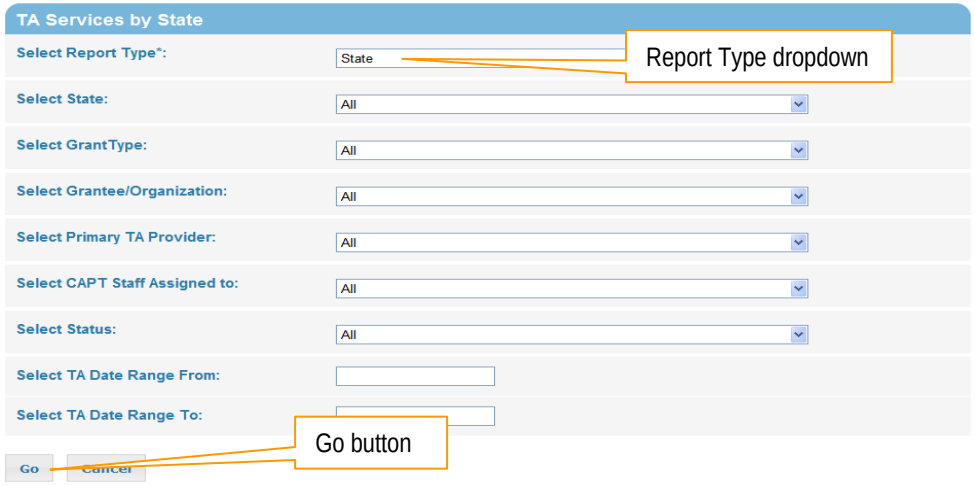
1. Click **Reports** from the Data Analysis Landing page.
2. Click the **TA Aggregate Report** link.



(This is a screenshot of the Reports Landing page.)

3. Select the Report Type from the **Select Report Type** drop down list: ***State*** or ***Grantee***.
4. Select the desired data from the dropdown lists or insert data in the text boxes.
5. Click the Go (**Go**) button to build a report based on the fields selected from the drop down lists.

*Note: Click the Cancel (**Cancel**) button at any time to return to the Reports page.



(This is a screenshot of the TA Aggregate Report Page.)

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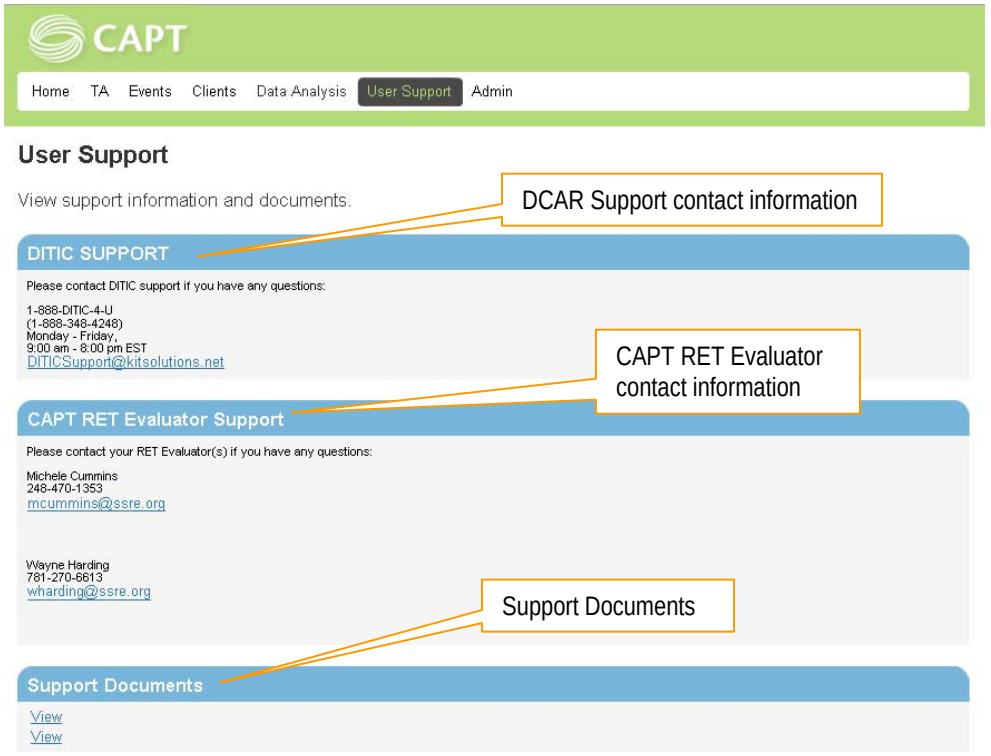
USER SUPPORT

The User Support section allows users to view support information and documents.

1. Click **User Support** from the Menu.
    a. Users can view contact information for **DCAR Support** and the **CAPT RET Evaluator**.
    b. Users can also view and download any uploaded **Support Documents**.



(This is a screenshot of the User Support Landing Page.)

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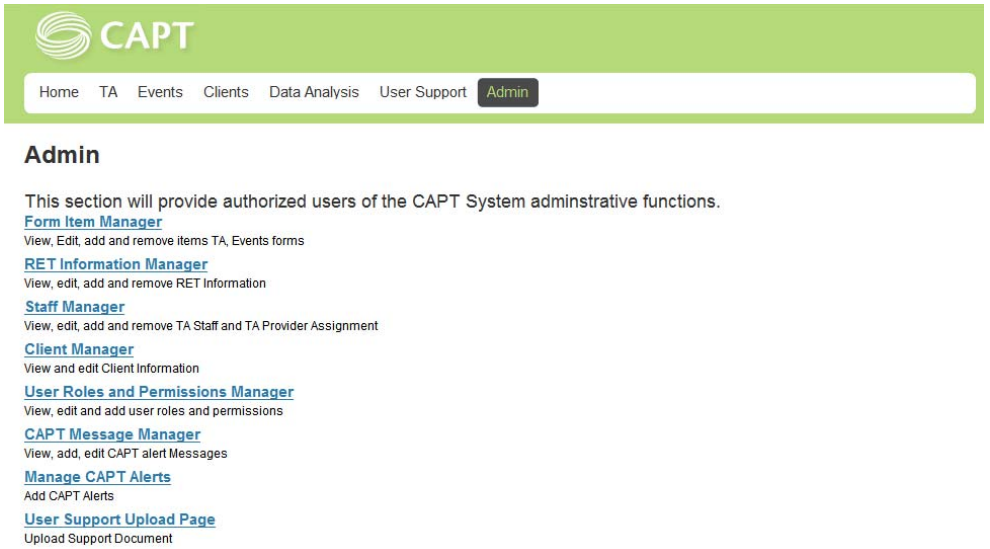
ADMINISTRATION

The Administration section will provide authorized users of the CAPT System administrative functions

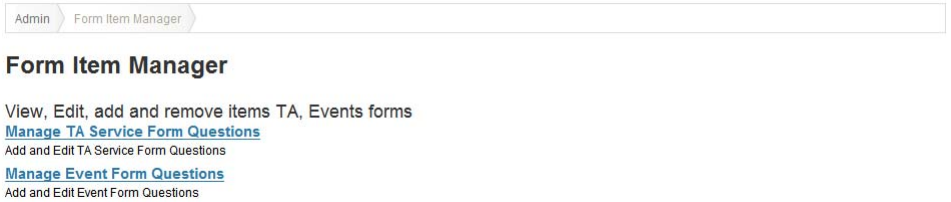
1. Click **Administration** from the Menu.
2. From the Administration landing page you can navigate to one of the following sections:
    a. Form Item Manager
    b. RET Information Manager
    c. Staff Manager
    d. Client Manager
    e. User Roles and Permissions Manager
    f. CAPT Message Manager
    g. Manage CAPT Alerts
    h. User Support Upload Page



(This is a screenshot of the Administration Landing Page.)

Form Item Manager

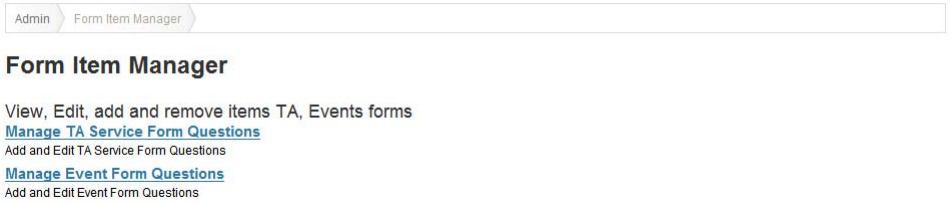
1. Click **Form Item Manager** from the Administration Landing page.
2. From the Form Item Manager Landing page you can navigate to one of the following sections:
    a. Manage TA Service Form Questions
    b. Manage Event Form Questions


Admin
Form Item Manager
Form Item Manager
View, Edit, add and remove items TA, Events forms
Manage TA Service Form Questions
Add and Edit TA Service Form Questions
Manage Event Form Questions
Add and Edit Event Form Questions

(This is a screenshot of the Form Item Manager Landing Page.)

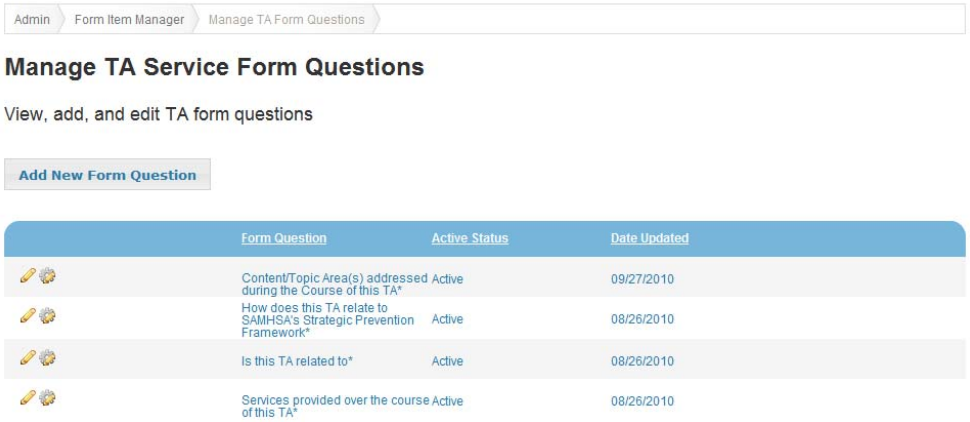
Manage TA Service/Event Form Questions

1. Click **Manage TA Service Form Questions** from the Form Item Manager Landing Page.
   or
   Click **Manage Event Form Questions** from the Form Item Manager Landing Page.


Admin
Form Item Manager
Form Item Manager
View, Edit, add and remove items TA, Events forms
Manage TA Service Form Questions
Add and Edit TA Service Form Questions
Manage Event Form Questions
Add and Edit Event Form Questions

(This is a screenshot of the Form Item Manager Landing Page.)

2. Click the Add New Form Question (**Add New Form Questions**) button to add new questions to the form.
3. Click the (**Edit Question**) icon to edit the form question.
4. Click the (**Edit Answer Options**) icon to edit the answer options.

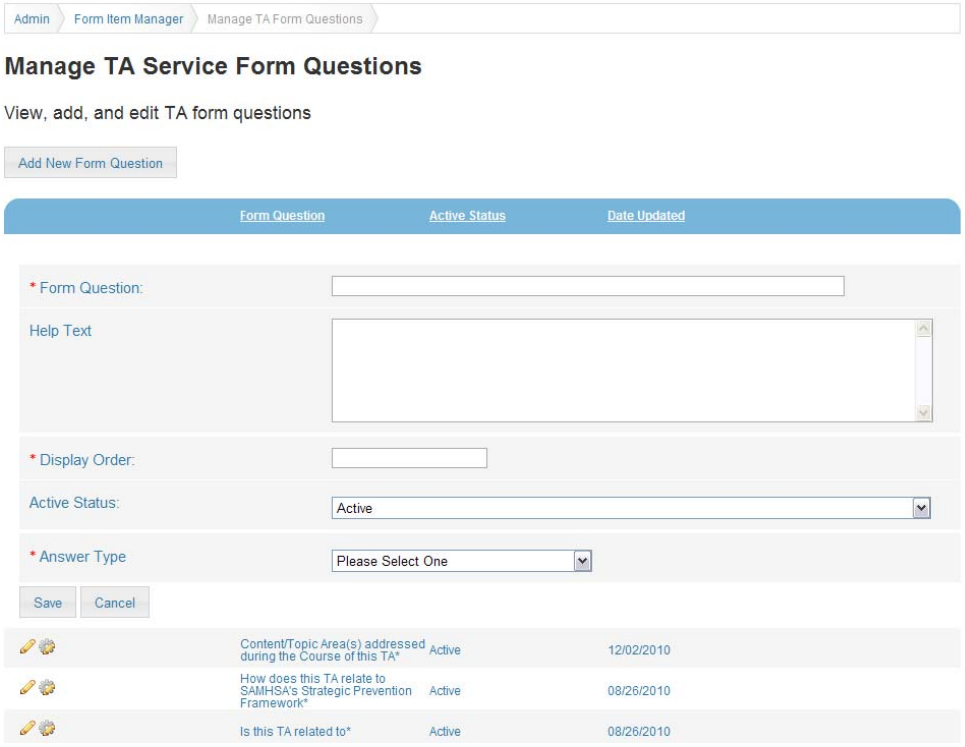


(This is a sample screenshot of the Manage TA Service Form Questions Listing Page.)

Adding TA Service/Event Form Question

1. From the Listing page, Click the Add New Form Question (Add New Form Question) button.
2. Enter all required fields, denoted by an asterisk (*).
3. The Active Status is defaulted to *Active.*
    a. *Active*: the question will appear in the TA Service/Event forms
    b. *Inactive*: the question will no longer appear in the TA Service/Event forms
4. Click the Save (Save) button to add a new question.

*Note: If you do not desire to add a new question, click the Cancel (Cancel) button to return to the TA Service/Event Form Question listing page.



(This is a screenshot of the Manage TA Service Form Questions Page.)

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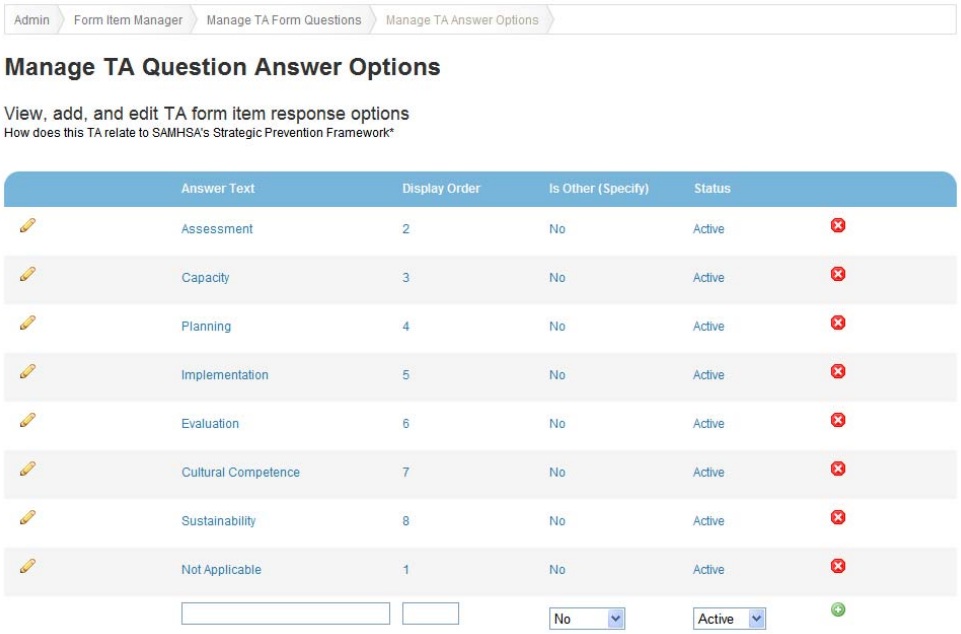
Manage TA/Event Question Answer Options

1. From the Listing page, click the (Edit Answer Options) icon.
2. Click the (Edit Question) icon to edit the Answer text.
3. Update desired Question Answer Options
    a. In edit mode, click the (Save) icon to save any changes.
    b. The Active Status is defaulted to *Active.*
        i. *Active*: the answer options will appear in TA Service/Event forms
        ii. *Inactive*: the answer options will no longer appear in the TA Service/Event forms
4. Click the (Delete) icon to delete the answer option.
5. Click the (Add) icon to add a new answer option.



(This is a screenshot of the Manage TA Question Answer Options Page.)

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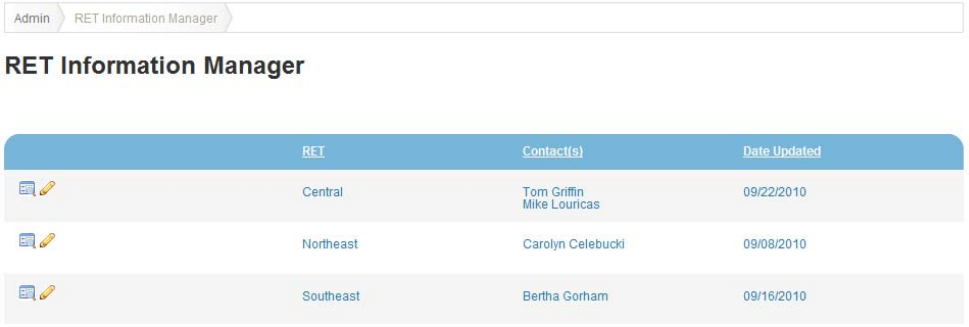
RET Information Manager

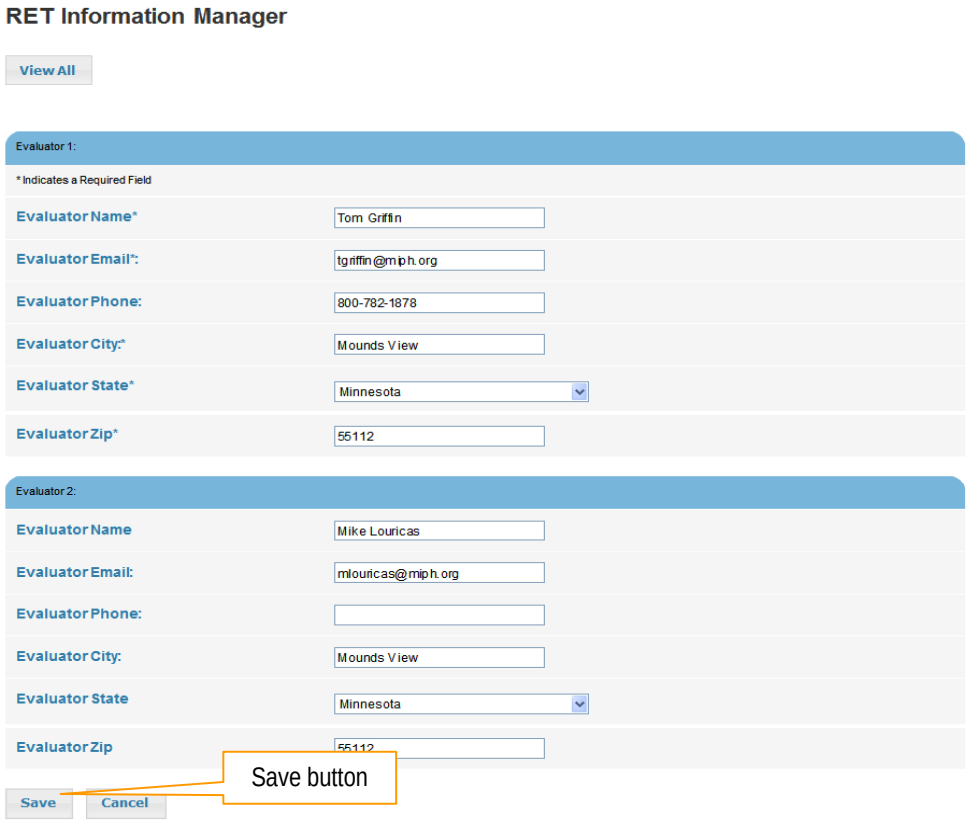
1. Click RET Information Manager from the Administration Landing page.
2. Click the (View) button to view the RET Information.
3. Click the (Edit) button to edit the RET Information.



(This is a sample screenshot of the RET Information Manager Listing Page.)

4. Update desired fields for the RET Evaluator.
5. Click the Save (Save) button update RET Information.

*Note: Click the Cancel (Cancel) button at any time to return to the Manage RET Information Manager listing page.



(This is a screenshot of the RET Information Manager Page.)

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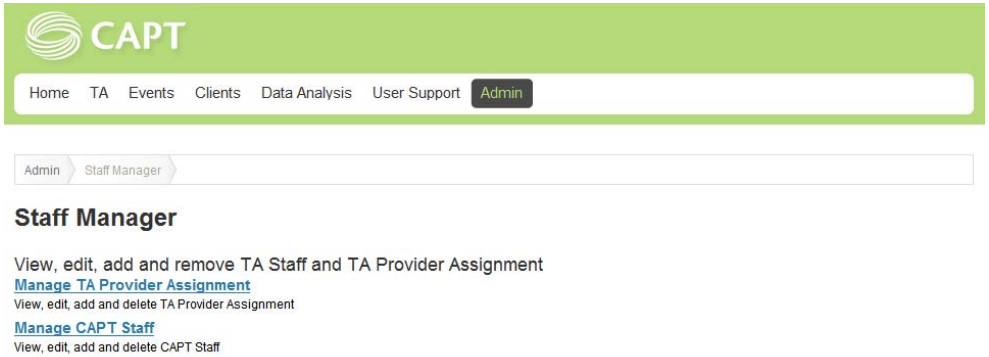
Staff Manager

1. Click **Staff Manager** from the Administration Landing page.
2. From the Staff Manager landing page you can navigate to one of the following sections:
    a. Manage TA Provider Assignment
    b. Manage CAPT Staff



(This is a screenshot of the Staff Manage Landing Page.)

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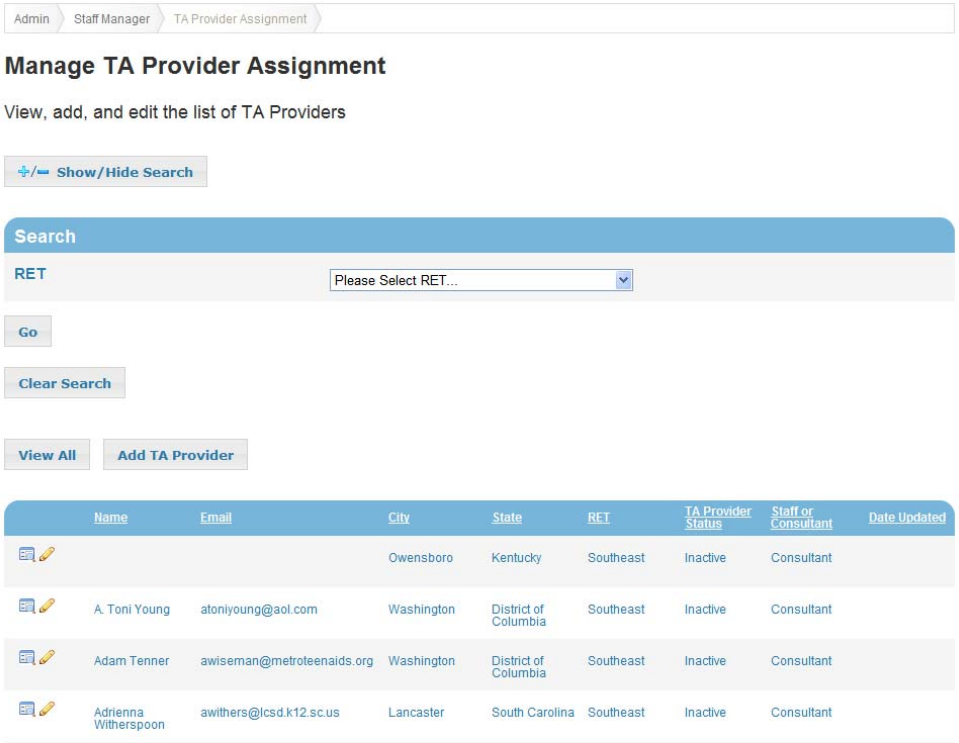
Manage TA Provider Assignment

1. Click **Manage TA provider Assignment** from the Staff Manager Landing page.
2. From the **Manage TA Provider Assignment** Listing page you can filter TA Provider information using the drop down boxes in the Search menu.
3. Click the Add TA Provider (**Add TA Provider**) button to add a new TA Provider.
4. Click the (**View**) button to view the TA Provider information entered for that record.
   Click the (**Edit**) button to edit the TA Provider information entered for that record.



(This is a sample screenshot of the Manage TA Provider Assignment Listing Page.)

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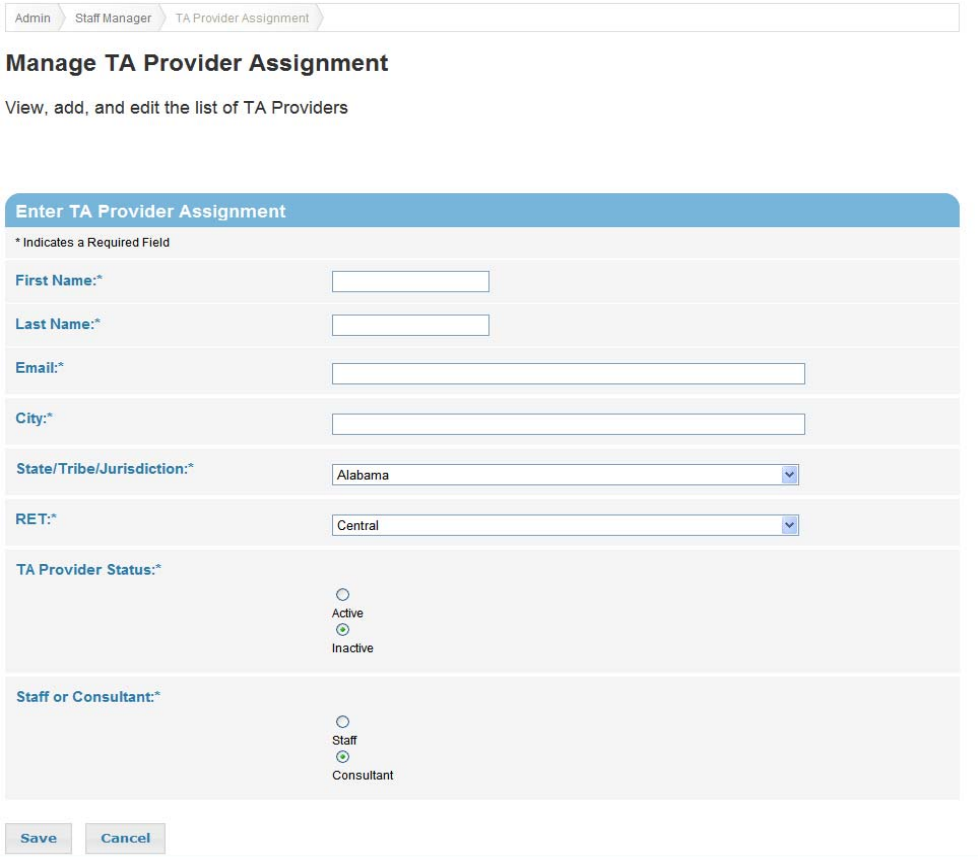
Add a TA Provider

1. From the Ta Provider Assignment Listing page, click the Add TA Provider (**Add TA Provider**) button.
2. Enter all required fields, denoted by an asterisk (*).
3. Click the Save (**Save**) button to add a new TA Provider.

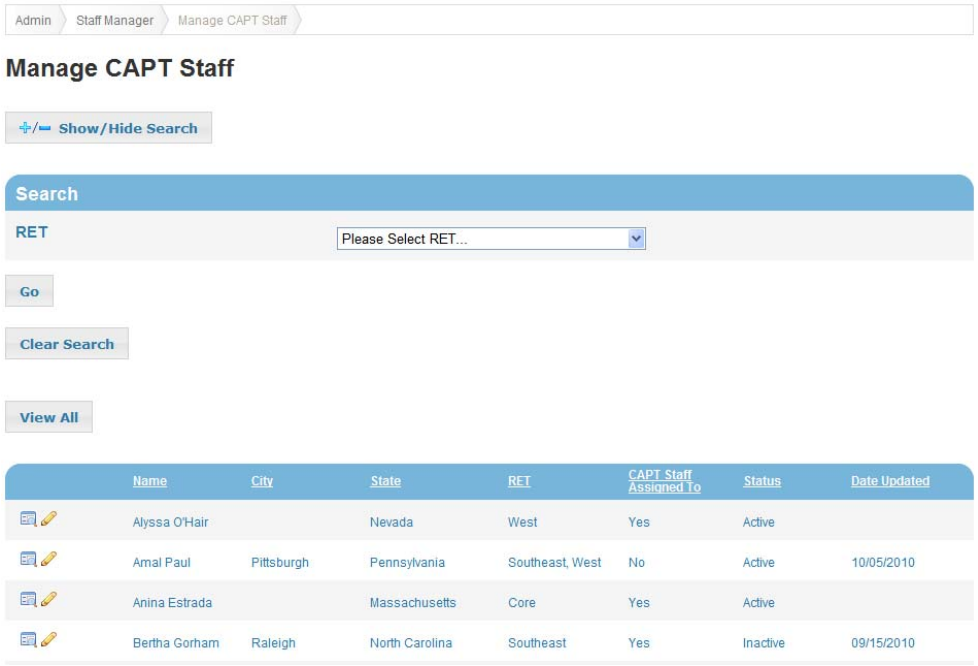
*Note: If you do not desire to add a new TA Provider click the Cancel (**Cancel**) button to return to the Manage TA Provider listing page.



(This is a sample screenshot of the Add A TA Provider Page.)

Manage CAPT Staff

1. Click **Manage CAPT Staff** from the Staff Manager Landing page.
2. From the **Manage CAPT Staff** Listing page you can filter CAPT Staff information using the drop down boxes in the Search menu.
3. Click the (**View**) button to view the CAPT Staff information entered for that record.
   Click the (**Edit**) button to edit the CAPT Staff information entered for that record.



(This is a sample screenshot of the Manage CAPT Staff Listing Page.)

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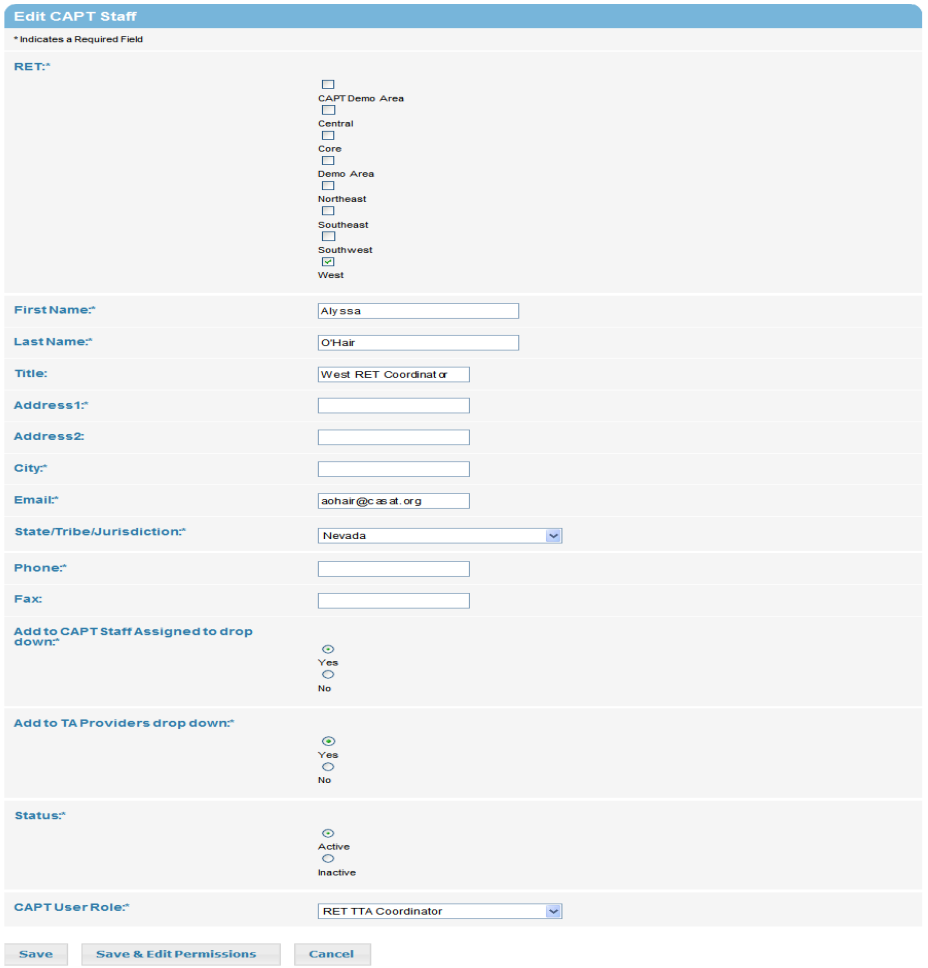
Edit CAPT Staff

1. From the Manage CAPT Staff Listing page, click the (**Edit**) button.
2. Update desired staff information and complete required fields denoted by an asterisk (*).
3. The Active Status is defaulted to *Active.*
    a. *Active*: the staff member will have access to the system or dropdown lists
    b. *Inactive*: the staff will no longer have access to the system or dropdown lists
4. Click the Save (**Save**) button to save CAPT Staff member information.
   *Note: If you do not desire to edit the CAPT Staff click the Cancel (**Cancel**) button to return to the Manage CAPT Staff listing page.
5. Click the Save & Edit Permissions (**Save & Edit Permissions**) button to access the User Permissions page in the Manage User Roles and Permissions section.



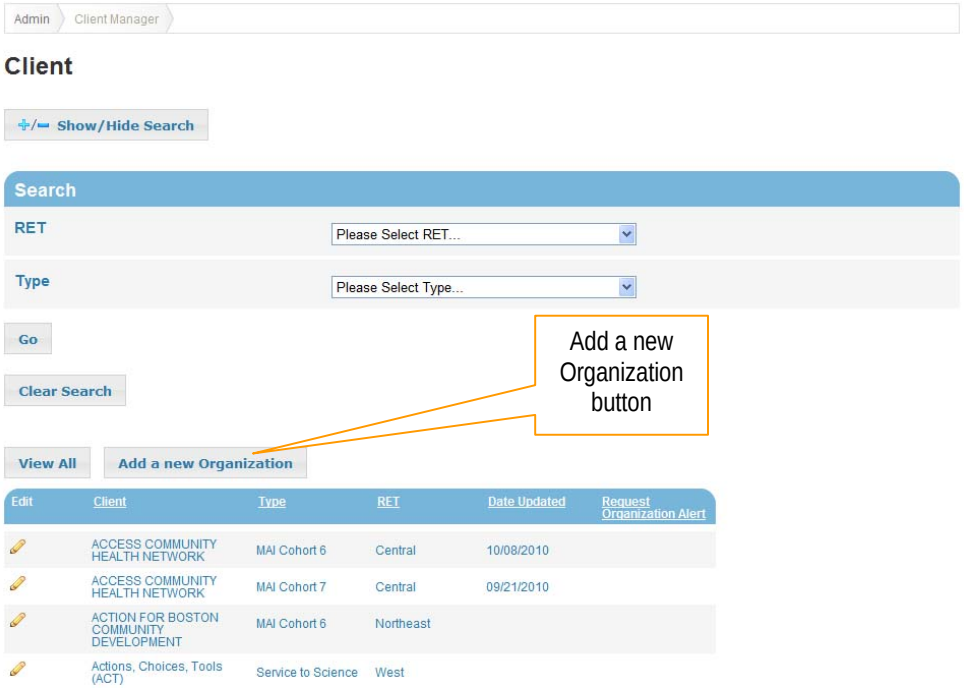
(This is a sample screenshot of the Edit CAPT Staff Page.)

Tips

- Currently adding staff members can not be done by Users. To have a staff member added for your RET please contact Support at DCARSupport@Kitsolutions.net
- The login information (User ID and Password) will be emailed to the newly created staff account.
- The "**Active Status**" is used to keep a staff member in the database for history purposes, but removed from all the staff lists on forms. When a staff member leaves your organization, you will not be able to delete the staff member if they performed services, but you can make them *Inactive* to remove their names from forms and prevent the staff member from entering CAPT.

Client Manager

1. Click **Client Manager** from the Administration Landing page.
2. From the **Client** Listing page you can filter client information using the drop down boxes in the Search menu.
3. Click the Add a new Organization (**Add a new Organization**) button to add a new Organization to the system.
4. Click the (**View**) button to view the client information entered for that record. Click the (**Edit**) button to edit the client information entered for that record.



(This is a sample screenshot of the Client Listing Page.)

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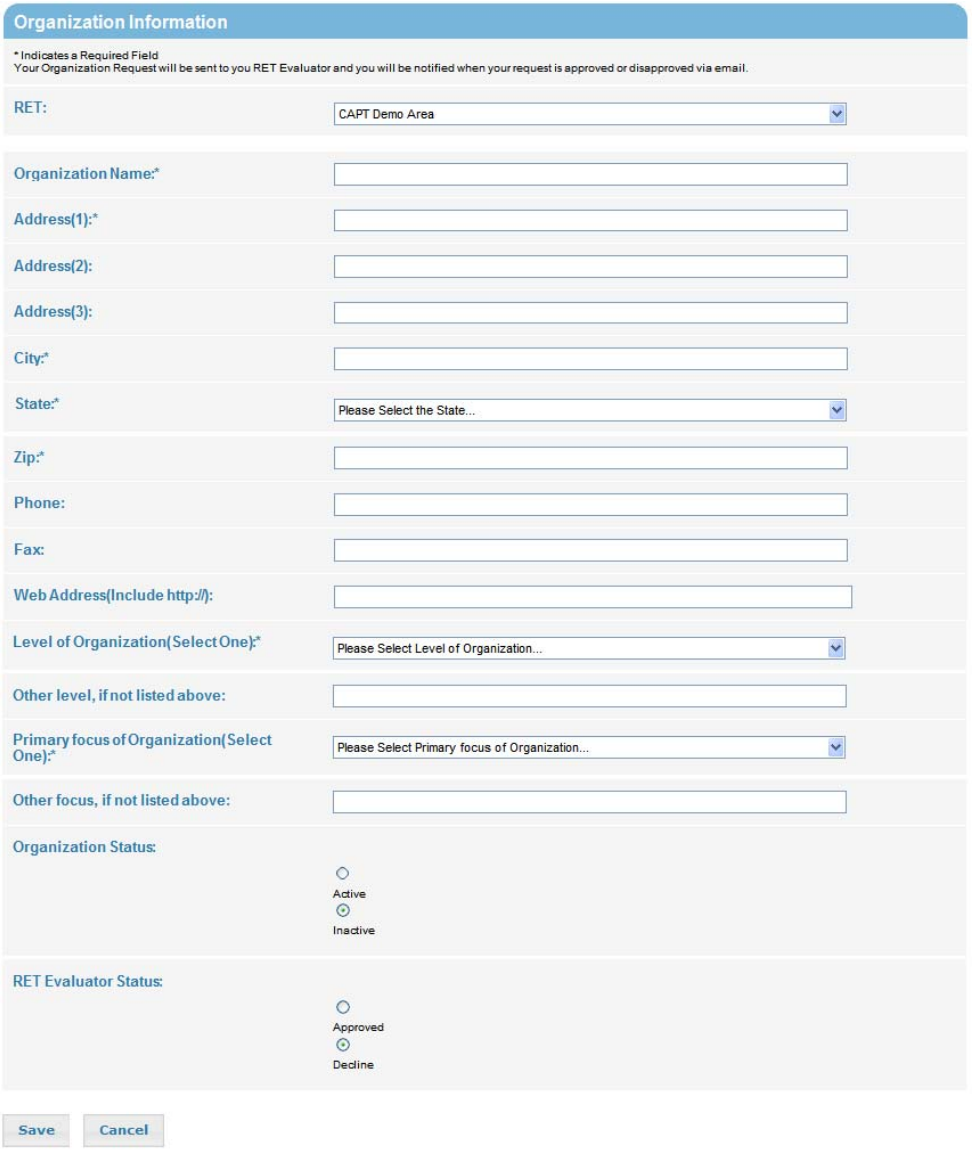
Adding Organization Information

1. From the Client Listing page, click the Add a new Organization (Add a new Organization) button.
2. Enter all required fields, denoted by an asterisk (*).
3. The Active Status is defaulted to ***Inactive.***
    a. ***Active***: the answer options will appear in TA Service/Event forms
    b. ***Inactive***: the answer options will no longer appear in the TA Service/Event forms
4. The RET Evaluator status is defaulted to ***Decline***
    a. ***Approve***: the Organization will appear in the Clients portion of the CAPT system
    b. ***Decline***: the Organization will not appear in the Clients portion of the CAPT system
5. Click the Save (Save) button to save organization information.

*Note: If you do not desire to add a new Organization click the Cancel (Cancel) button to return to the Client listing page.



(This is a sample screenshot of the Add An Organization Page.)

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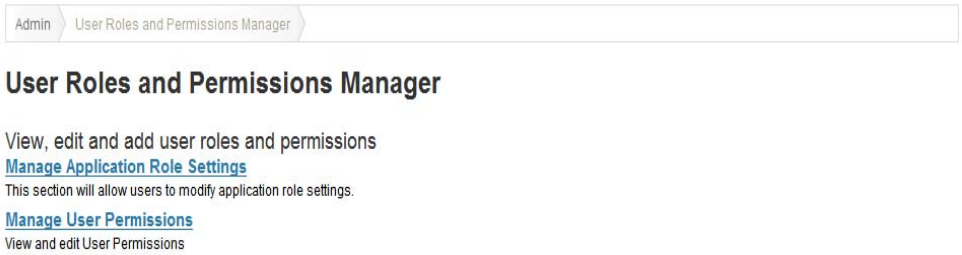
User Roles and Permissions Manager

1. Click **User Roles and Permissions Manager** from the Administration Landing page.
2. From the User Roles and Permissions Manager landing page you can navigate to one of the following sections:
    a. Manage Application Role Settings
    b. Manage User Permissions

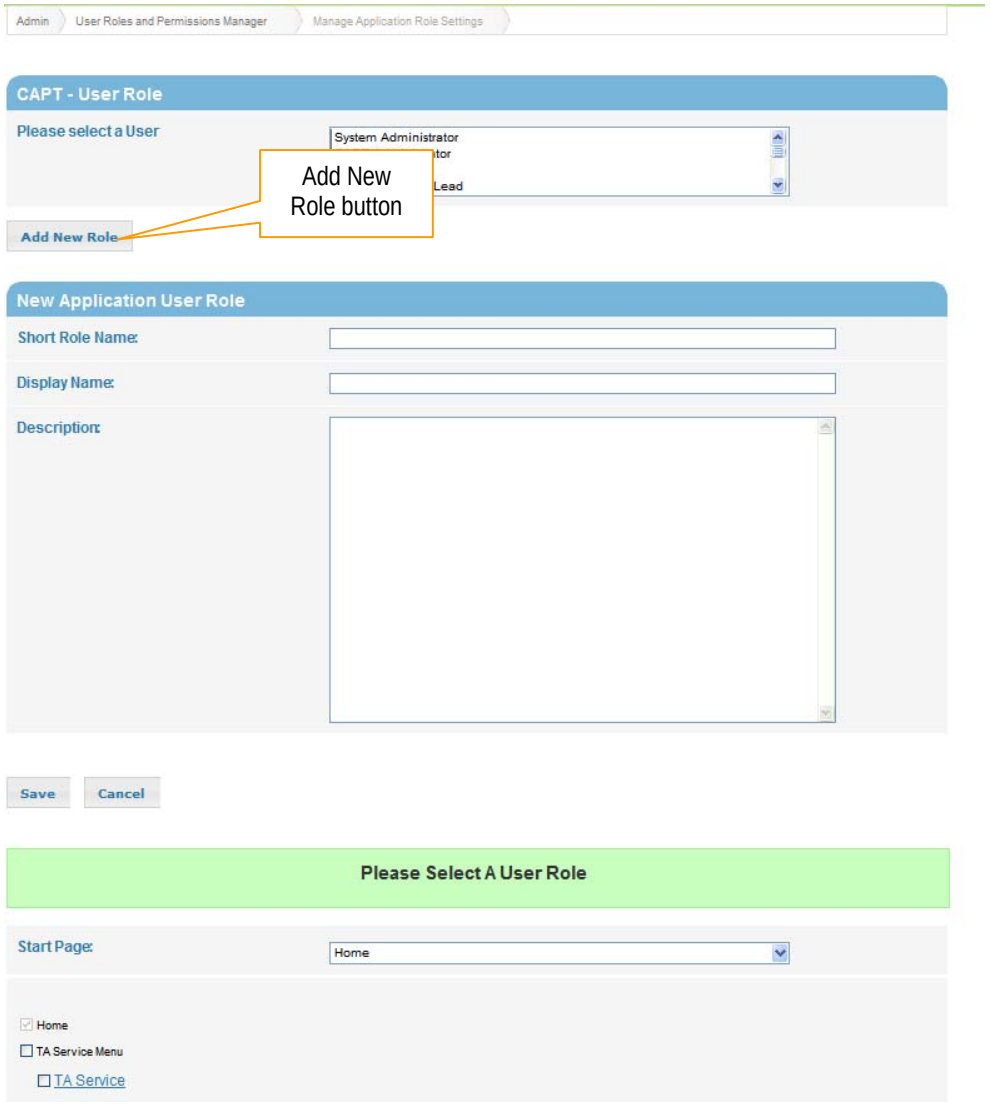

Admin
User Roles and Permissions Manager
User Roles and Permissions Manager
View, edit and add user roles and permissions
Manage Application Role Settings
This section will allow users to modify application role settings.
Manage User Permissions
View and edit User Permissions

(This is a screenshot of the User Roles and Permissions Manager Landing Page.)

Manage Application Role Settings

1. Click the **Manage Application Role Settings** from the User Roles and Permissions Manager Landing page.
2. Select a User Role from the **Please Select a User** list to view that role's setting. A list of checkboxes will appear displaying the pages the role has access to.
3. To add a new role, click the Add New Role (**Add New Role**) button.
    a. Enter Short Role Name, Display Name and Description.
    b. Click the Save (**Save**) button to save the new role.
    c. Select the new User Role from the **Please Select a User** list.
    d. Edit the settings to the role selected.
    e. Click the Save (**Save**) button to save the Role Settings.

    *Note: If you do not desire to add a new role or edit role settings click the Cancel (Cancel) button.



(This is a partial screenshot of the Manage Application Role Settings Page.)

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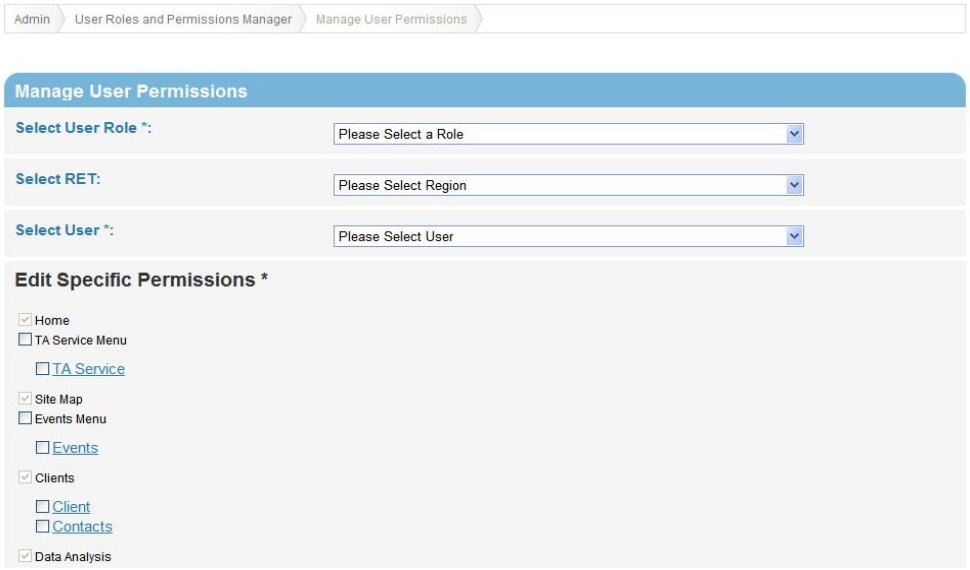
Manage User Permissions

1. Click the **Manage User Permissions** from the User Roles and Permissions Manager Landing page.
2. Select a User Role from the **Select User Role** drop down list.
3. If known, select the user's RET from the **Select RET** drop down list.
4. Select a User whose permissions you wish to edit from the **Select User** drop down list.
5. Edit the settings to the role selected.
6. Click the Save (**Save**) button to save the User's Permissions.

*Note: If you do not desire to edit the user permissions click the Cancel (**Cancel**) button.

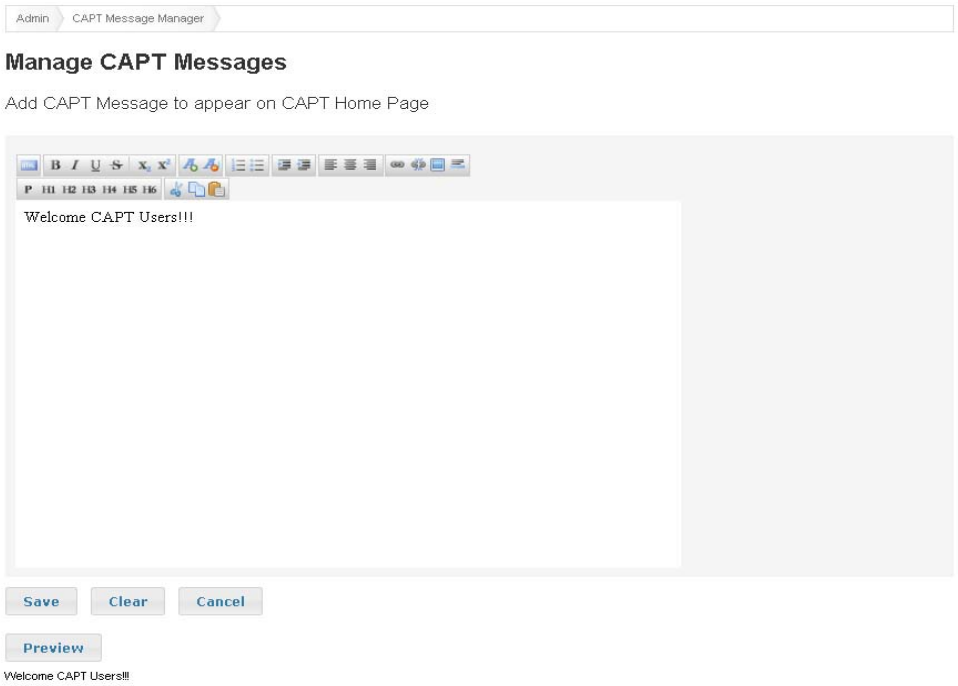


(This is a partial screenshot of the Manage User Permissions Page.)

CAPT Message Manager

1. Click **CAPT Message Manager** from the Administration Landing page.
2. Enter desired CAPT message.
3. Click the Preview (**Preview**) button to preview the CAPT Message as it will appear on the Home page.
4. Click the Clear (**Clear**) button to clear the content in the CAPT Message box.
5. Click the Save (**Save**) button to save the CAPT Message.

*Note: If you do not desire to add a new CAPT message, click the Cancel (**Cancel**) button.



(This is a sample screenshot of the Manage CAPT Messages Page.)

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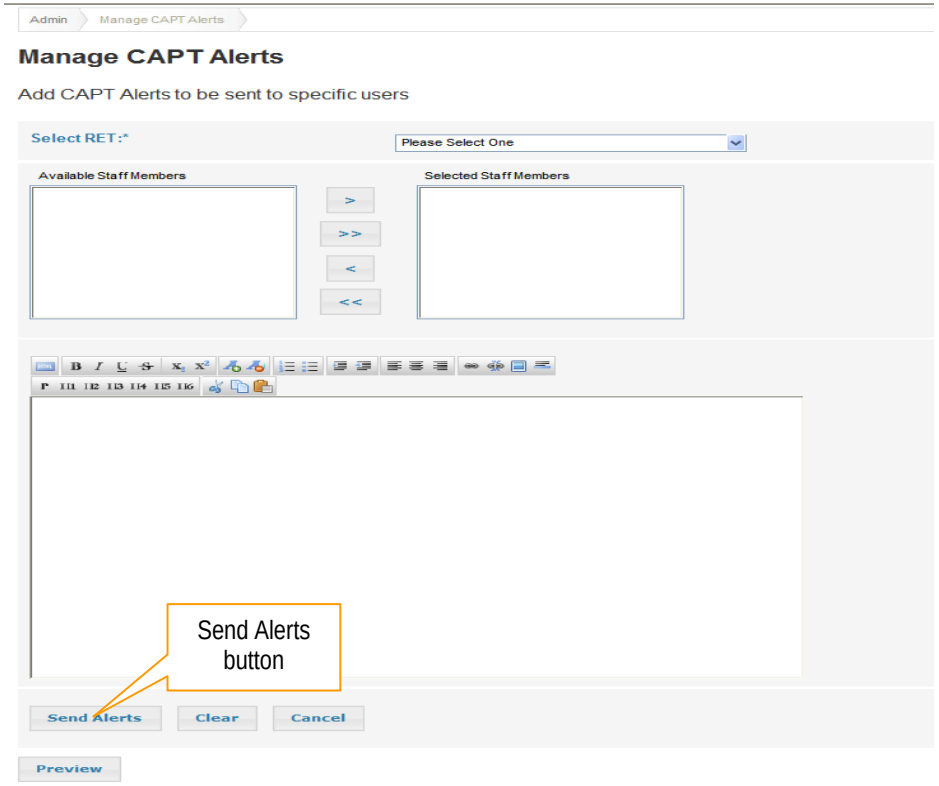
Manage CAPT Alerts

1. Click **Manage CAPT Alerts** from the Administration Landing page.
2. Select a RET from the **Select RET** drop down list.
3. Select Staff members from the Available Staff Members box and use the > (**Move one to the right**), >> (**Move all to the right**), < (**Move one to the left**), << (**Move all to the left**) buttons to move them into the Selected Staff Members box.
4. Enter desired CAPT Alert Message.
5. Click the Preview (**Preview**) button to preview the CAPT Alert as it will appear on the Home page.
6. Click the Clear (**Clear**) button to clear the content in the CAPT Alert box.
7. Click the Send Alerts (**Send Alerts**) button to send CAPT Alerts to the Selected Staff Members.

*Note: If you do not desire to send a CAPT Alert click the Cancel (**Cancel**) button.



(This is a screenshot of the Manage CAPT Alerts Page.)

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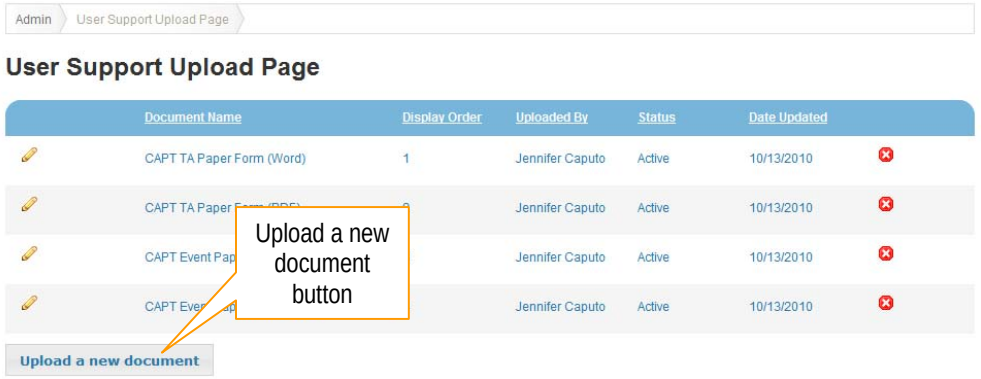
User Support Upload Page

1. Click **User Support Upload Page** from the Administration Landing page.
2. Click the (**Edit**) icon to edit the User Support Document.
3. Click the (**Delete**) icon to delete the User Support Document.
4. Click the Upload a new document (**Upload a New Document**) button to upload a new document to appear on the User Support page.
5. Enter all required fields for uploading a new document.
6. Click the Upload (**Upload**) button.

*Note: If you do not desire to upload a new document click the Cancel (**Cancel**) button.



(This is a screenshot of the User Support Upload Page.)

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